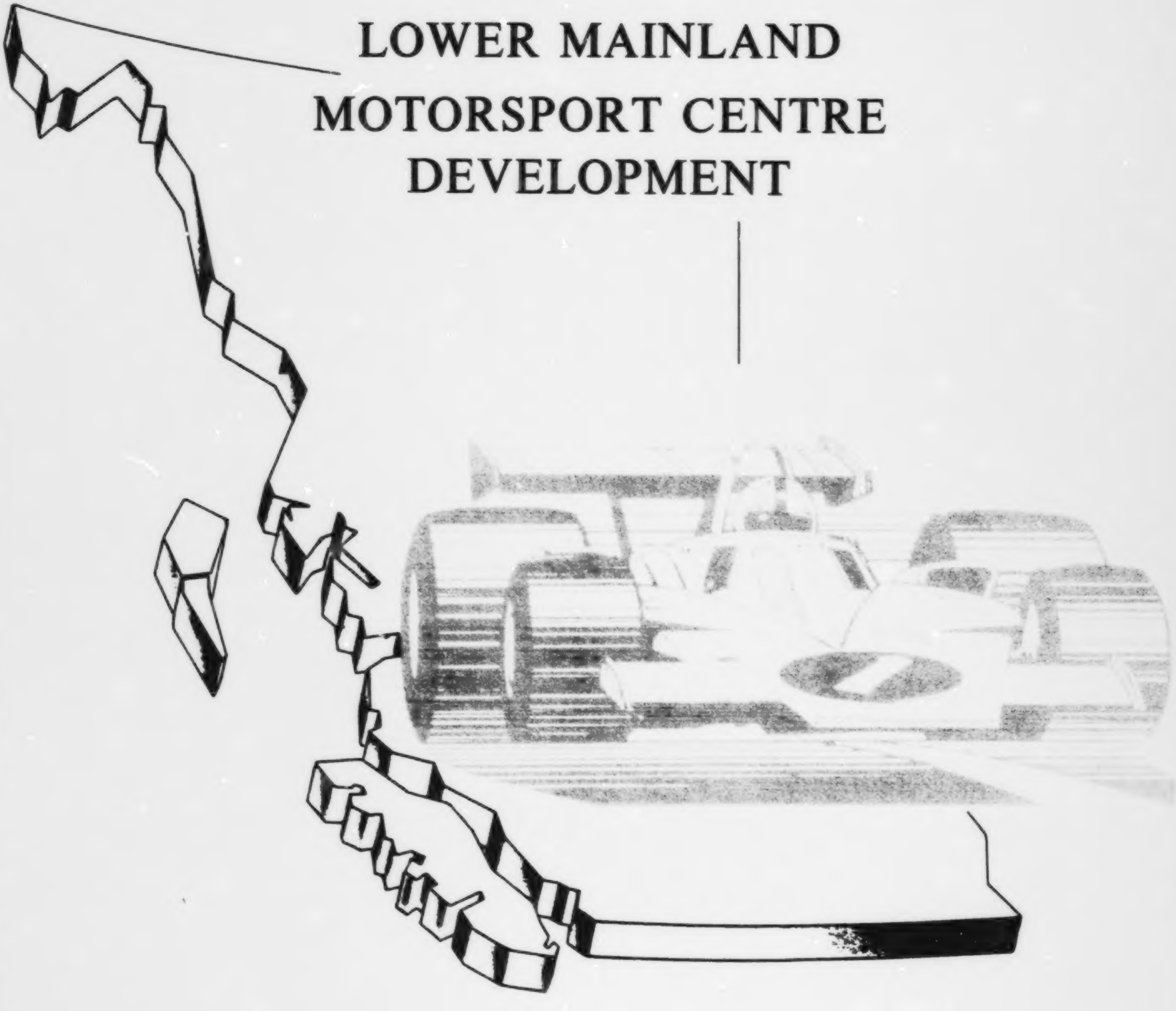
Ministry of Industry and
Small Business Development

THE HONOURABLE BOB McCLELLAND, MINISTER

LOWER MAINLAND
MOTORSPORT CENTRE DEVELOPMENT



86-07367

4

LOWER MAINLAND
MOTORSPORT CENTRE
DEVELOPMENT

Canadian Cataloguing in Publication Data
Main entry under title:
Lower mainland motorsport centre

Cover title: Lower mainland motorsport centre development.
ISBN 0-7726-0293-X

1. Motorsports - British Columbia - Lower Mainland Region. 2. Sports facilities - British Columbia - Lower Mainland Region. I. British Columbia. Ministry of Industry and Small Business Development. II. Thorne Stevenson & Kellogg Limited. III. Novacorp Consulting Inc. IV. Race Circuit Management Inc. V. Title. Lower mainland motorsport centre development.

338.4'77967'0971133
GV1034.15.A1L69 1985 C85-092126-0

TABLE OF CONTENTS

Chapter Page

I INTRODUCTION 1

- A. Existing facilities are facing major problems 2
- B. Motorsport is believed to represent significant economic and social benefits 4
- C. Objectives of the study are market and economic oriented 5
- D. Study results will be used in the development process for a motorsport centre 5

II HIGHLIGHTS 7

- A. Many Lower Mainland residents are interested in motorsport 7
- B. Thousands of companies derive some business from motorsport 7
- C. Estimates of the current direct economic impact of competitive motorsport approach $100 million 8
- D. The proposed centre would accommodate large increases in competitive motorsport activity 8
- E. Motorsport activity increases would directly generate economic benefits on the Lower Mainland 9
- F. Social benefits would increase and environmental impacts would be managed 9
- G. Important steps need to be taken quickly to facilitate motorsport centre development 10

III THE MOTORSPORT CENTRE CONCEPT 11

- A. A variety of facilities will be included 11
- B. The centre will appeal to all levels of motorsport activity 15
- C. Management will become involved in various ways 17
- D. Both the public sector and the private sector will likely be involved 18

TABLE OF CONTENTS — CONTINUED

Chapter Page

IV CURRENT MOTORSPORT PARTICIPATION 21

A. Existing facilities were once well used but problems have occurred in recent years 21
B. Lower Mainland resident involvement is substantial 27
C. Motorsport participants are heavily involved in the sport 31
D. General attitudes towards motorsport are positive 33
E. Motorsport participation in the U.S. is a valuable comparison 33
F. The future of motorsport in the Lower Mainland is uncertain 36

V ECONOMIC CHARACTERISTICS OF THE MOTORSPORT INDUSTRY 37

A. The approach to the research had to be carefully designed 37
B. Businesses involved in motorsport have varied characteristics 40
C. The motorsport industry is responsible for many jobs 47
D. The future for motorsport related business could be optimistic 53
E. Direct economic benefits derived from motorsport approach $100 million 57

VI EXPECTED MOTORSPORT CENTRE UTILIZATION 60

A. Other motorsport facilities have proven successful 60
B. A broad spectrum of motorsport enthusiasts will take advantage of the centre 61
C. Many non-motorsport organizations will likely make use of the facilities developed 73
D. Overall motorsport centre utilization will be significant 75
E. The base forecasts are measured in spectator days 77

TABLE OF CONTENTS — CONTINUED

Chapter		Page
VII	FINANCIAL CHARACTERISTICS OF THE CENTRE	80
	A. Capital development costs are significant	80
	B. Motorsport centre operations will generate substantial revenue	82
VIII	ECONOMIC BENEFITS OF THE MOTORSPORT CENTRE	88
	A. Significant new employment opportunities will be created	88
	B. Non-wage economic benefits accuring to the Lower Mainland will increase	101
	C. Total direct economic activity will increase by $110 million annually after five years	107
	D. The multiplier effect will significantly increase economic benefits accruing to the Lower Mainland	112
IX	SOCIAL AND ENVIRONMENTAL DIMENSIONS OF MOTORSPORT	118
	A. Problems attributable to existing motorsport facilities on the Lower Mainland are relatively minor	118
	B. Social benefits to charitable organizations would be realized from motorsport centre development	120
	C. Social benefits could be reduced with a motorsport centre	122
	D. Noise impacts of the motorsport centre can be managed	124
X	IMPLEMENTATION GUIDELINES	126
	A. Motorsport groups will need to take the lead role during the implementation process	126
	B. Securing an appropriate site in conjunction with municipal support is the next critical step	127
	C. Continuing unity and timing are critical elements of implementation	128

TABLE OF CONTENTS -- CONTINUED

Chapter

Page

APPENDICES 129

A. Terms of Reference -- Lower Mainland Motorsport Centre Economic and Market Study
B. Motorsport Facilities in the Lower Mainland
C. Conceptual Physical Description of the Proposed Centre
D. Motorsport Facility Case Studies
E. Market Research of Lower Mainland Residents
F. Market Research of Lower Mainland Participants
G. Market Research of U.S. Participation in Motorsport
H. Economic Characteristics of the Motorsport Industry

oOo

I

INTRODUCTION

Motorsport activity in the Lower Mainland has been popular for decades. As motorsport enthusiasts throughout North America have become involved in this recreational pursuit in increasing numbers in recent years, problems with existing facilities in the Lower Mainland have either reduced participation levels or threatened to restrict motorsport activity in the future.

Motorsport organizations and facility operators have become increasingly aware of the constraints which are restricting their future development. Indeed, they feel that their very survival is at stake. In an attempt to find appropriate solutions to this dilemma, existing organizations and operators came together in 1984 under an umbrella organization named the B.C. Association of Motorsport Facilities. This association undertook the initiative to increase the awareness of both the general public in the Lower Mainland and various levels of the public sector to the problems which motorsport faces.

The Government of British Columbia became aware of existing problems facing motorsport in 1982. During 1983, the Government commissioned a study to examine current constraints and opportunities. A possible solution which would incorporate all Lower Mainland motorsport facilities into one motorsport centre was considered to have particular merit and was examined during the study in 1983.

The "Lower Mainland Motorsport Centre -- Preliminary Assessment" study was completed and submitted in November of 1983. The study indicated that there was clear and widespread support for solving the motorsport problem, that a motorsport centre could be a viable solution and that a properly developed motorsport centre would actually enhance the sport and increase the benefits derived. One of the most important findings from this study was that a variety of companies and organizations in British Columbia which are not involved in motorsport, would welcome such a facility and would make use of it for a variety of purposes such as emergency vehicle driver training, new vehicle testing and filming of commercials. Another important finding was that a wide variety of businesses in the Lower Mainland appear to depend on both competitive and non-competitive motorsport activity for a significant share of their revenue.

Following completion of the study in 1983, it became apparent that pressures on existing facilities to close or relocate was increasing. The B.C. Association of Motorsport Facilities was formed and evaluated carefully the steps required to pursue the development of a motorsport centre. During the second half of 1984, this association and the Government of British Columbia reached an agreement to work together in evaluating the motorsport centre opportunity further. One of the principal decisions made between these two organizations was jointly to fund and commission a more detailed evaluation of the demand for, and the economic benefits likely to be derived from, a motorsport centre.

In December, 1984 the B.C. Association of Motorsport Facilities and the Government of British Columbia commissioned Thorne Stevenson & Kellogg to undertake a market and economic study of the proposed motorsport centre. Novacorp Consulting Inc. of Vancouver and Race Circuit Management Inc. of Long Beach were retained as subcontractors by Thorne Stevenson & Kellogg. This document contains two sections. The main report comprises the first eight chapters and detailed information follows in the appendices. The entire document constitutes the final report for the study.

A. EXISTING FACILITIES ARE FACING MAJOR PROBLEMS

Three motorsport facilities are presently located in the Lower Mainland:

- ► Action Raceway - an oval track located in Langley;
- ► Mission Raceway - a drag strip and motocross track located in Mission; and
- ► Westwood Motorsport Park - a road racing track and a go-kart track located in Coquitlam.

Each facility is facing current or imminent constraints to its operations and/or future development.

1. Action Raceway's lease has not been renewed for 1985

Action Raceway is operated by the Lower Mainland Oval Racing Association (LMORA) and has, until recently, leased land within Campbell Valley Regional Park from the Greater Vancouver Regional District. This regional park is classified as a nature park and the G.V.R.D. has indicated its desire for Action Raceway to relocate for several years. Lacking the funds with which to build a new facility and the land on which a facility could be constructed, LMORA has been unable to comply with the G.V.R.D.'s wishes.

Since lease renewals have been granted by G.V.R.D. on a year-to-year basis in the recent past, Action Raceway has been unable to upgrade existing facilities to the extent required and to commit to multi-year sponsorship arrangements. Activity levels have, therefore, slowly declined. Early in 1985, the G.V.R.D. indicated that Action Raceway's lease would not be renewed for the 1985 season. The future of oval track racing in the Lower Mainland is therefore in jeopardy.

2. Mission Raceway's facilities are inadequate

Mission Raceway has been active since the 1960's. During the 1960's and early 1970's many drag racing events took place at that facility.

The drag racing facility located in Mission relocated in 1978 to an adjacent piece of property to make way for industrial development on its old land. The new property has been owned by and the new facility has been operated by the B.C. Custom Car Association (BCCCA) since that time.

Following relocation of the Mission facility, a variety of factors prevented the BCCCA from developing the property to the level of the previous location. Financial resources have not been available to pave the drag strip and the many events that used to be held, have not been held due to inadequate facilities.

The BCCCA has developed Mission Raceway to some extent. It now incorporates a sand drag strip, a motocross track, bleachers and a timing tower. Due to its location on the Fraser River the club also organizes drag boat races during the summer.

Inadequate drag racing facilities (i.e., a paved drag strip) have prevented Mission Raceway from staging popular drag oriented events for six years now. This major constraint has resulted in substantially reduced utilization of the property and has caused many drag racing enthusiasts to participate in events south of the border.

3. Westwood Motorsport Park is on borrowed time

The road racing course at Westwood has been the most popular motorsport facility in the Lower Mainland in recent years. A wide variety of major and minor events have attracted large numbers of B.C. and United States spectators and participants to this facility.

Westwood Motorsport Park is operated by the Sports Car Club of British Columbia (SCCBC) on a lease arrangement from the B.C. Ministry of Lands, Parks and Housing. This lease was due to expire at the end of 1984. The land on which the race track is located is zoned for housing.

In recent years, due to the expectation that Westwood's lease would eventually be cancelled, the SCCBC has been unable to make the facility improvements necessary to attract major events and large numbers of spectators. To accommodate the largest and most popular events, the capacity of road access, parking and pit areas needs to be expanded. Furthermore, the constraints of a short-term lease prevent Westwood from negotiating important multi-year sponsorship arrangements.

It is evident that Westwood Motorsport Park is indeed "living on borrowed time". The SCCBC has been given a lease extension for the 1985 season. While welcome, this short-term lease extension still represents operational constraints for the facility. It is also just a matter of time before Westwood will need to relocate to ensure its long-term security and viability.

B. MOTORSPORT IS BELIEVED TO REPRESENT SIGNIFICANT ECONOMIC AND SOCIAL BENEFITS

As mentioned earlier, the motorsport work carried out in the Lower Mainland in 1983 indicated widespread involvement and support for this recreational activity and hinted that many businesses benefit from the competitive and non-competitive aspects of the sport. These factors were important considerations in seeking an approach towards solving motorsport's current problems.

Motorsport has neither been recognized as a major recreational pursuit nor a major economic contributor in the Lower Mainland in the past. This is largely due to two factors:

- Involvement in motorsport encompasses many different activities and participation is accomplished through hundreds of small clubs and organizations.
- No specific research has been carried out previously into the sport and its economic implications in the Lower Mainland.

The results of the 1983 work and the coming together of the many groups and organizations involved in the sport under the B.C. Association of Motorsport Facilities, were the initial steps which enabled the scope and importance of motorsport to become recognized. While these steps alone did not define the overall importance of motorsport, they did produce indicators that the social and economic value of this activity were considerably greater than was previously recognized.

Since reliable statistics on motorsport demand and economic benefits in the Lower Mainland were not available, the idea of an economic and market study evolved.

C. OBJECTIVES OF THE STUDY ARE MARKET AND ECONOMIC ORIENTED

The primary focus of this study was on the demand for and economic implications of motorsport centre development in the Lower Mainland.

As stated in the Terms of Reference (included as Appendix A) the objective of the study is:

> ... to undertake a detailed market analysis and economic benefit assessment for the establishment and operation of a motorsport centre in the Lower Mainland.

As requested, the study did not include physical planning and analysis work. The general physical concept for the centre as described in the "Lower Mainland Motorsport Centre -- Preliminary Assessment" report was used. This concept does include the incorporation of a drag strip, an oval track, a road racing course and an off-road course into one general area.

The work undertaken was further oriented towards providing the following:

> ... details concerning expected users, participants and spectators and reliable data associated with motorsport activity in the Lower Mainland and the proposed motorsport centre.

Work carried out during the study did overlap. However, the project was completed in a manner which addressed three specific phases, as requested:

- Phase I - Data assembly and baseline interpretation.
- Phase II - Market analysis and benefit assessment of motorsport centre operations and economic implications for the motorsport industry.
- Phase III - Conclusions and recommendations.

All of these objectives and guidelines for the work have been achieved and the relevant results are incorporated into this final report.

D. STUDY RESULTS WILL BE USED IN THE DEVELOPMENT PROCESS FOR A MOTORSPORT CENTRE

The results of this study alone are not sufficient to ensure that a motorsport centre is developed. They will, however, prove valuable to those organizations, government departments and private sector companies which will undertake responsibility for ensuring that development does occur.

A variety of constraints must still be overcome before a new motorsport centre can be developed and become operational. The understanding of the economic characteristics of the motorsport industry, the level of participation in motorsport by Lower Mainland residents and the utilization forecasts for a new motorsport centre provided in this report should prove useful in overcoming many of these constraints.

II

HIGHLIGHTS

Results achieved during this market and economic study are described in some detail in this report. Supporting information and details are included in the appendices. Principal findings of significance and importance are outlined briefly in this Chapter.

A. MANY LOWER MAINLAND RESIDENTS ARE INTERESTED IN MOTORSPORT

Survey results show clearly that, when compared to many recreational activities, motorsport is a very popular pursuit.

- In total, 18% of Lower Mainland residents have either attended or watched some motorsport event over the past two years.
- Some 44% of those residents who have been involved in motorsport have attended a motorsport event in person over the last two years.
- Eighteen per cent of the population who have never been involved with motorsport indicated some level of interest in watching or attending such an event.

B. THOUSANDS OF COMPANIES DERIVE SOME BUSINESS FROM MOTORSPORT

While the proportion of overall business volume generated by motorsport is frequently low in a given firm, it is estimated that several thousand Lower Mainland companies derive sales revenue directly as a result of competitive motorsport activity in the Lower Mainland.

- Business sectors benefiting most from motorsport activity are those involved in automotive and motorcycle sales, supply and servicing.
- Businesses within these key sectors reported that anywhere from 1/2% to 28% of sales volume can be attributed to competitive motorsport activity in the Lower Mainland.

- Most businesses surveyed rely on general motorsport enthusiasm in the Lower Mainland for between 4% and 40% of their sales volume.

C. ESTIMATES OF THE CURRENT DIRECT ECONOMIC IMPACT OF COMPETITIVE MOTORSPORT APPROACH $100 MILLION

The businesses which serve the motorsport industry generate substantial economic benefits to the Lower Mainland economy.

- We estimate that close to 900 Lower Mainland jobs are supported by competitive motorsport activity.
- We estimate that close to $30 million finds its way directly into the British Columbia economy due to purchases of goods and services resulting from competitive motorsport.
- We estimate that over $50 million of profits and taxes are generated by British Columbia companies as a direct result of competitive motorsport revenues.

D. THE PROPOSED CENTRE WOULD ACCOMMODATE LARGE INCREASES IN COMPETITIVE MOTORSPORT ACTIVITY

Market demand in the Lower Mainland is strong and the regional, national and international appeal of a major motorsport centre hosting high calibre events is expected to be significant.

- Attendance at motorsport events is expected to increase some 600% from existing levels to 410,000 spectator-days annually over five years if the proposed centre is developed.
- It is expected that most types of motorsport activity would be accommodated at the new complex.
- Initially a total of 69 events would be held each year increasing to 100 per year after four or five years of operation.
- The centre would be a strong recreational asset in the Lower Mainland and most utilization would be by the hundreds of small clubs and groups now involved in motorsport.

E. MOTORSPORT ACTIVITY INCREASES WOULD DIRECTLY GENERATE ECONOMIC BENEFITS IN THE LOWER MAINLAND

A motorsport centre would enable and encourage more people to become involved in the sport. This increase in involvement and the large numbers of visitors expected to attend events from outside the Province will generate a variety of jobs and economic benefits.

- Many small companies would likely double in size as motorsport activity increases and drag racing returns to the Lower Mainland.
- At major races visitors from outside the Lower Mainland are expected to account for up to 26% of total attendance representing up to 20,000 visitors at some major events with most of these being United States residents.
- It is estimated that motorsport centre development will result in over 300 new man-years of employment during its first year and more than 1,100 man-years of employment annually after five years.
- Total new direct economic activity in the Lower Mainland will exceed $30 million in 1986 and $110 million in 1990 and thereafter if the proposed centre becomes operational in 1986.
- It is estimated that total annual expenditures by visitors attending motorsport events will increase by more than 20 times once the motorsport centre has been operating for five years.

We conclude that the development of a motorsport centre in the Lower Mainland would result in large positive economic and social benefits to the Province of British Columbia.

F. SOCIAL BENEFITS WOULD INCREASE AND ENVIRONMENTAL IMPACTS WOULD BE MANAGED

The social value of motorsport centre development will be realized in a number of areas and negative impacts such as noise and traffic would be well managed as they have been elsewhere.

- Many charitable organizations and community service groups would be provided with numerous opportunities to raise funds because of motorsport centre development.
- Current problems and dangers associated with street drag racing and unorganized 'dirt bike' and 'four wheel drive' vehicle operations would be reduced.

- The motorsport centre would incorporate design features and operational conditions which would reduce noise impact to acceptable levels.

G. IMPORTANT STEPS NEED TO BE TAKEN QUICKLY TO FACILITATE MOTORSPORT CENTRE DEVELOPMENT

This study provides important information and conclusions which should be used to assist in the motorsport centre development process. A number of critical steps are, however, necessary.

- Motorsport groups will need to take the leading role during the development process.
- For the centre to become operational by 1986, it is crucial that the motorsport groups, the Provincial Government and various municipalities work together immediately to determine an appropriate location.
- Examination of liquor advertising regulations and border crossing efficiency by the public sector are encouraged and appropriate action could facilitate the implementation process.

III

THE MOTORSPORT CENTRE CONCEPT

This study investigated the demand for motorsport in the Lower Mainland and the economic benefits which are derived, both directly and indirectly, from local and visitor participation in motorsport. This chapter describes the concept of a motorsport centre so that future demand as well as future economic and social implications can be judged against a well-defined development plan. Additional details of the physical concept envisioned are included in Appendix C of this report.

A. A VARIETY OF FACILITIES WILL BE INCLUDED

The basic intention of a motorsport centre is to combine all motorsport facilities which presently exist in the Lower Mainland into one location. The site for the complex, while yet to be selected, will provide the long-term security required to support the necessary investment and to ensure that all facilities are maintained at a fully functional level.

1. Major facilities will accommodate all types of motorsport

The proposed motorsport centre will incorporate existing Lower Mainland facilities as listed below:

- Oval track facilities presently located at Action Raceway.
- Drag strip and motocross facilities presently located at Mission Raceway.
- Road course and go-kart track facilities presently located at Westwood Motorsport Park.

For purposes of this study, we have assumed that an "off-road" course for use by "four-wheel drive" vehicles will also be incorporated into the proposed centre. Other competitive facilities may be included in the overall complex as detailed planning takes place. One example could be areas to accommodate drag boat racing.

Conceptually, the major facilities located within the motorsport centre are described graphically in Exhibit III-1.

EXHIBIT III-1 Major motorsport centre facilities

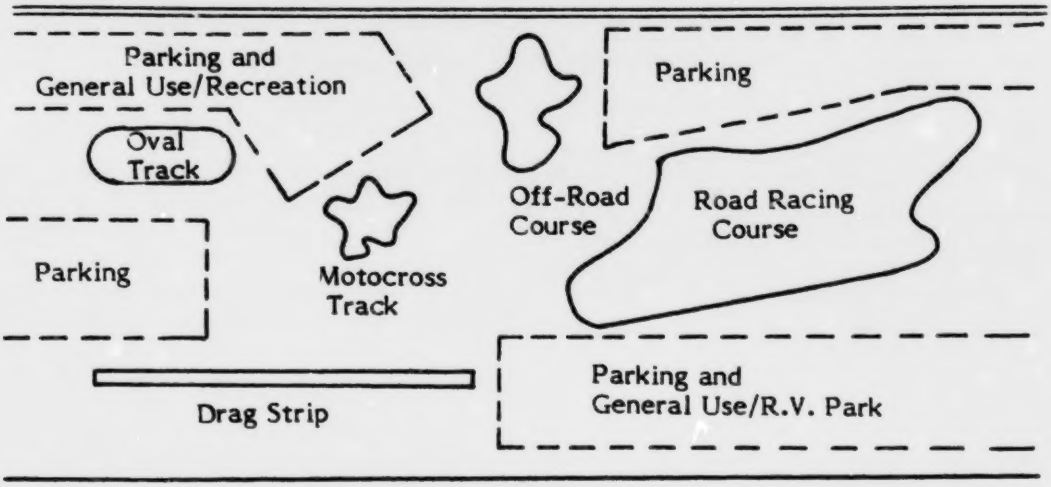

Parking and
General Use/Recreation
Oval
Track
Parking
Motocross
Track
Off-Road
Course
Parking
Road Racing
Course
Drag Strip
Parking and
General Use/R.V. Park

Exhibit III-1 is not intended to be to scale but is, rather, intended to enable the reader to visualize the nature of the motorsport centre concept. The configuration of facilities to be included will depend on the final design of each and on the characteristics of the site selected.

The basic characteristics of each of the major facilities as identified through earlier work[1] undertaken are as follows:

▶	Road Racing Course	- approximately four kilometers of paved race track;
▶	Oval Track	- approximately 600 metres (3/8 mile) in length with potential to expand to approximately 800 metres (1/2 mile).
▶	Drag Strip	- approximately 1200 metres (3/4 mile) in length including the drag run-off area;

---

[1] "Lower Mainland Motorsport Centre -- Preliminary Assessment" Novacorp Consulting Inc. -- November, 1983.

- Off-Road Course - which can vary in length but which will require an area of ten to fifty acres depending on the utilization expected;
- Motocross Track - which will also vary in length depending on the utilization expected; and
- Go-Kart Track - which will be designed based on the expected type and level of utilization.

The major facilities at the proposed motorsport centre along with the support facilities necessary to enable effective operation are expected to require in the range of 120 to 170 hectares of land.

The overall physical concept described above includes flexibility for expansion. In fact, specific facilities could be constructed several years after the centre opens. Phasing will depend on capital availability and expected timing of utilization. For purposes of this study we have assumed that all major facilities are constructed at one time and all become operational during the same year.

2. Supporting facilities will provide all the required amenities

In addition to the major motorsport event facilities described above, a variety of supporting facilities are critical to the proposed centre and would, therefore, be constructed during the initial stage of development. Critical support facilities include the following:

- Access and circulation roads.
- Parking areas.
- Water, power and disposal services.
- Spectator bleachers.
- Timing and control towers.
- Pit areas for competitive vehicles.
- Concession stands.
- Washroom/shower facilities.

- Ticket and crowd control facilities.
- Office, meeting and storage buildings.
- Medical facilities.

Earlier work has indicated clearly that a variety of additional user and spectator amenities should or could be included in the overall development to increase its overall appeal and usability. Examples are as follows:

- Campground and recreational vehicle areas which could assist in accommodating the demand expected during Expo '86.
- Bicycle paths/jogging trails.
- Recreation and playground areas.
- Picnic areas.
- Garage/workshop areas.
- Interpretive/information buildings.

Additionally, depending on the site finally selected for the motorsport centre, opportunities could be created to take advantage of the expected activity from a commercial perspective, in providing needed goods and services. These may be incorporated into an industrial park surrounding the complex. Examples of facilities which may be developed on or near the proposed centre include the following:

- Restaurants.
- Food and merchandise retail outlets.
- Service stations.
- Motels and hotels.
- Auto parts suppliers.
- High performance engine service companies.

In summary, a variety of facilities and businesses such as those mentioned above could form part of the overall motorsport centre. The greater the number of facilities and services available the greater will be the appeal of the proposed complex and the local economic impact realized.

For purposes of this study, it has been assumed that all major motorsport facilities and all critical service facilities and amenities described above will be included in the final development plan. Non-motorsport commercial facilities at or close to the centre have not been included directly in the analysis.

3. Non-Motorsport utilization is expected

In addition to the facilities and services planned which relate directly to motorsport activity, once the centre is developed other users will take advantage of the facilities and some will make arrangements to include specific additional facilities at the complex. This has proven to be the case at existing Lower Mainland motorsport facilities and is common at other motorsport centres throughout North America.

The likelihood of non-motorsport use and non-motorsport facilities was investigated in previous work[1] undertaken. To enable the reader to better understand the overall physical concept of the proposed motorsport centre, some of the additional facilities which may be incorporated are listed below.

- Skid pads for emergency vehicle driver training.
- Test tracks for automobile company vehicle testing.
- Areas for outdoor concerts.
- Museum facilities.

B. THE CENTRE WILL APPEAL TO ALL LEVELS OF MOTORSPORT ACTIVITY

There are three principal reasons for considering the development of a motorsport centre:

- Motorsport is a popular recreational activity which requires the proposed facilities to ensure continued participation in the Lower Mainland.

---

[1] "Lower Mainland Motorsport Centre -- Preliminary Assessment" Novacorp Consulting Inc. -- November, 1983.

- Motorsport activity, at the level which now exists, is important to many small and medium-sized businesses located in the Lower Mainland.

- Major motorsport events attract tens of thousands of spectators, bring in visitors from outside of B.C. and are, therefore, stimulators to the local, regional and provincial economies.

The first reason is one which is socially oriented and takes into account the recreational needs of Lower Mainland residents. The second two reasons are economically oriented and take into account both the present and future economic value of motorsport and its related activities.

1. Small motorsport groups and clubs will use the centre

From an operational perspective, and based on the above observations, the hundreds of small motorsport clubs and groups located in the Lower Mainland must have ongoing access to the facilities proposed. This "grass roots" support for, and involvement in, motorsport continues to be an important asset of other motorsport centres as is evident at Portland International Raceway in Oregon.

For purposes of this study therefore, we have assumed that regional, local and club events will constitute a major component of the annual calendar of events at the proposed centre. These events, however, are unlikely to generate substantial revenue for the facility by themselves.

2. Major events will generate considerable revenue

The scope and calibre of the proposed motorsport centre, combined with the interest in motorsport in the Lower Mainland and the proximity of Vancouver to large markets of motorsport enthusiasts in Western Canada and the U.S. Pacific Northwest, indicate that major events can be held which attract large numbers of spectators. We have assumed, therefore, that major national and international events will be held at the complex. The type of benefits derived from these events can be summarized as follows:

- Major events will generate substantial revenue streams for the centre and assist in covering its costs.

- Major events will bring visitors into British Columbia and therefore contribute to the provincial economy.

- Major events will be of strong interest to members of Lower Mainland clubs.

- Major events will appeal to the large portion of the Lower Mainland resident population which is interested in viewing motorsport events.

We have estimated that up to twenty major motorsport events will be held at the proposed centre on an annual basis. The nature of these events and their expected appeal was carefully evaluated so that the schedule proposed and the demand forecasted reflect realistic interpretations of future utilization of the complex.

C. MANAGEMENT WILL BECOME INVOLVED IN VARIOUS WAYS

The organizational and promotional requirements of each type of event likely to be held at the new centre, both large and small, were investigated. An understanding of the nature of management's involvement in each of these events is critical to a determination of both costs and revenues for the centre.

It is beyond the scope of this study to develop an organizational and staffing plan for the complex. This will, eventually, be required during the planning and implementation process. We did, however, prepare a profile of expected involvement by centre management in the organization and promotion of specific events.

Before describing management's role in the context described above, we should recognize both the advantages and disadvantages of various types of involvement by race track management. These are summarized below:

- Organization and promotion of major events often necessitates the commitment of substantial financial resources. While the rewards are high if a specific event is successful, the downside risk of low attendance due to factors such as ineffective promotion or poor weather can also be substantial.

- Successful organization and promotion of major events requires a thorough understanding of the markets to which the events appeal, special capabilities in the promotional field and substantial flexibility in terms of decisions and resources on the part of the promoter.

- Small local or regional events often require considerable organization and promotion. Since revenue generated from these events is often limited, volunteer resources within the clubs involved should be used to a maximum when these events are staged.

Analysis of the advantages and disadvantages as well as the constraints and opportunities associated with track management involvement at various levels was undertaken. Interviews were held with existing motorsport facility operators in the Lower Mainland and with operators from elsewhere in Canada and the United States. An appreciation of the likely involvement by both the public sector and the private sector was factored into this analysis. Our evaluation of operational involvement by motorsport centre management is summarized in Exhibit III-2.

The operating arrangements described in Exhibit III-2 will enable management of the motorsport centre to take maximum advantage of revenue generating opportunities and, at the same time, to take into account acceptable levels of risk, available financial resources and the anticipated flexibility in decision making. Organization and promotion of very large events (e.g. major road races) would become the responsibility of promoters who know the markets involved and/or who have the financial resources required to stage the event. This distinction and separation of responsibility is important since the many events which will exist will result in a succession of activity throughout the motorsport season.

The revenue projections for the motorsport centre which are described in Chapter VII take into account these operational assumptions.

D. BOTH THE PUBLIC SECTOR AND THE PRIVATE SECTOR WILL LIKELY BE INVOLVED

Development of a motorsport centre in the Lower Mainland will require both a significant land area and a significant capital investment. It is beyond the scope of this study to examine the various ways which the public sector and the private sector could contribute to this project. As indicated in previous work[1], however, there is good reason for both public sector and private sector investment in a project of this nature.

The type and extent of financial and operational involvement by various companies, governments and government departments will be decided over time. At this stage of the work, however, a number of advantages to public and private sector involvement can be identified.

- Private Companies: An opportunity to gain wide-spread exposure while contributing to a socially and economically worthwhile project.

---

[1] "Lower Mainland Motorsport Centre -- Preliminary Assessment" Novacorp Consulting Inc. -- November, 1983.

EXHIBIT III-2 Involvement in event organization & promotion by management

Type of Event		Type of Involvement
• Drag Racing	- Major Events	Management takes secondary role in organization and promotion.
	- Regional/Club Events	Management undertakes all organization and promotion responsibility.
• Oval Track Racing	- Major Events	Management undertakes most organization and promotion responsibility.
	Regional/Club Events	Management has very limited involvement ... basically rental of facilities.
• Road Racing	- Major Events	Management has limited involvement ... basically facility rental and percentage of gross revenue.
	- Regional/National Events	Management undertakes most organization and promotion responsibility.
	- Club Events	Management has very limited involvement ... basically rental of facilities.
• Off Road Racing	- All Events	Management has very limited involvement ... basically rental of facilities.
• Motocross	- All Events	Management has very limited involvement ... basically rental of facilities.
• Go-Kart Racing	- All Events	Management has very limited involvement ... basically rental of facilities.

- Federal and Provincial Government: An opportunity to retain existing jobs, generate new jobs and to bring in much needed visitor revenue.
- Regional Government: An opportunity to provide a regional recreational facility which is in high demand.
- Local Government: An opportunity to provide a major stimulus to the local economy and to gain widespread recognition through major event exposure.

The results of this study will likely be used by potential investors to determine the value which they place on their contribution. However, both moral and financial support from various sources will likely be required to ensure that a motorsport centre is developed in the Lower Mainland.

IV

CURRENT MOTORSPORT PARTICIPATION

Work undertaken during this study included detailed evaluation of the involvement and the interest of Lower Mainland residents in motorsport activity. Market research was designed to provide results which have sufficient statistical accuracy to enable conclusions to be drawn concerning the population within this primary market area. Details of the approach used are provided in Appendices E and F.

This chapter includes principal results of research into the Lower Mainland motorsport market. Results are included from survey work of the general population, survey work of motorsport participants themselves, research into the use of existing Lower Mainland facilities and research of a variety of other similar facilities throughout North America. Detailed results and data are included in Appendices D, E and F of this report.

A. EXISTING FACILITIES WERE ONCE WELL USED BUT PROBLEMS HAVE OCCURRED IN RECENT YEARS

The three Lower Mainland motorsport facilities which presently exist (i.e. Action Raceway, Mission Raceway and Westwood Motorsport Park) have experienced substantial levels of activity at specific times in the past. The pressures and constraints associated with inadequate facilities and/or short-term lease arrangements have, however, resulted in a decline in activity in recent years.

1. Action Raceway

The principal activity accommodated at this facility is oval track racing which is usually referred to as "stock car" racing. This type of competitive motorsport activity involves the use of vehicles which most people would recognize (i.e. they are similar in physical appearance to automobiles purchased from dealers and operated on the road). The resemblance stops here, however, since all stock cars are modified to varying degrees for racing purposes. The most common modifications are to the engines, suspensions, wheels, tires and interiors of the vehicles.

Action Raceway has hosted other types of events as well (e.g. tractor pulls). These supplementary events, however, are generally included as components of an oval track racing program to increase the appeal of the overall show.

As was mentioned earlier in this report, Action Raceway operates under lease from the Greater Vancouver Regional District and is located within Campbell Valley Regional Park. This recreational area is classified as a nature park by the G.V.R.D. and, as such, competitive motorsport activity has been considered as inconsistent with the designated use of the park. Consequently, the Lower Mainland Oval Racing Association (L.M.O.R.A.), the club which operates Action Raceway, has faced pressure over the last several years to relocate the facility. The club has been operating on a year-to-year lease renewal basis over this period. The G.V.R.D. has decided not to renew this lease for the 1985 season.

The pressures on Action Raceway to relocate, the future uncertainty of the facility, the operational restrictions imposed, and the inability to make necessary investments to improve the race track and its supporting facilities has resulted in a decline in competitive motorsport activity at Action Raceway in recent years. Available statistics confirm this decline as may be seen in Exhibit IV-1.

EXHIBIT IV-1 Comparative attendance statistics at Action Raceway

Year	Event	Approximate attendance
1982	Open Competition[1] - 1st Event	4,500
	Open Competition - 2nd Event	3,500
1984	Open Competition[1] - 1st Event	2,250
	Open Competition - 2nd Event	2,000

---

[1] "Open Competition" events at Action Raceway are open to participants from outside B.C., including the United States, have the greatest appeal and involve vehicles with the greatest extent of modification.

Research has shown that a decline in spectator attendance at club events has also been experienced over this period. Principal reasons for decline in attendance are tied directly to the uncertainty of the future of the facility but can be translated into the following:

- Uncertainty has led to many vehicle drivers and owners being unwilling to make the investment necessary to modify their cars to the most competitive extent possible.
- Uncertainty has reduced the level of promotional expenditures that can be made on each event and, therefore, reduced the exposure of events and the attendance generated.
- Uncertainty has prevented track operators from concluding multi-year sponsor participation arrangements and, therefore, has reduced the overall revenue generating potential of the facility.

Opportunities do exist to significantly expand oval track racing in the Lower Mainland. The above constraints must, however, be overcome to enable organizers to take advantage of these opportunities. Future utilization of an oval track at the proposed motorsport centre is discussed in detail in Chapter VI of this document.

2. Mission Raceway

The only drag racing facility in the Lower Mainland is located at Mission Raceway. This drag strip is unpaved and therefore only accommodates "sand drag" activities. Mission Raceway also incorporates a motocross track which supports a variety of competitive events throughout the year.

Drag racing activity in the Lower Mainland became severely curtailed about six years ago when the drag strip was relocated from an adjacent property to its present location in Mission. The old track was paved and supported a wide variety of competitive events. Attendance was significant.

Since relocation, by far the most significant factor causing the decline in drag racing activity has been the lack of sufficient financial resources to pave the existing strip, the run-off area and the return lane. Since proper drag racing facilities do not now exist, most participants have either stayed involved with the sport by using facilities in the United States or have ceased their involvement altogether. The B.C. Custom Car Association, which owns and operates Mission Raceway, has refocused its attention to organizing sand drags, motocross and drag boat events on the Fraser River.

Available statistics provide a realistic interpretation of this once popular motorsport activity. These are summarized in Exhibit IV-2.

EXHIBIT IV-2 Comparative attendance statistics at Mission Raceway

Year	Event	Approximate event attendance
1969	World Championship Series	4,500
1970	World Championship Series	5,400
1971	World Championship Series	Rained Out
1972	World Championship Series	7,100
1973	World Championship Series	4,200
1974	World Championship Series	5,100
1975	World Championship Series	4,000
1975	World Championship Series	3,900
1977	World Championship Series	4,500
1978-1984	World Championship Series	Zero - Not Held
1984	All Motocross Events	600

Exhibit IV-2 clearly indicates the decline in major event activity at Mission Raceway after 1977. The smaller regional drag events also stopped at that time. However, during the ten-year period from 1967 to 1976, twelve to fourteen smaller events were held annually with each attracting over 2,300 spectators and over 130 drivers on the average. The total attendance for all motocross events in 1984 was only about 600. It is estimated that close to 5,000 people attended the boat drag races in 1984. These activity levels are, however, substantially below what was normally the case when the paved drag strip was in operation.

3. Westwood Motorsport Park

Westwood has been the location of the Lower Mainland's road racing course for decades. The facility hosts a wide variety of automobile races, motorcycle races and go-kart races each year. In addition, a small go-kart race track is located at Westwood which is used primarily for small club events.

Westwood Motorsport Park is used for a variety of non-competitive motorsport activities as well as non-motorsport activities, although it serves primarily a competitive racing centre. Examples of non-competitive motorsport use include swap meets, picnics, social events and car shows. Non-motorsport utilization includes car company testing of new vehicles, filming of commercials and similar activities that generate lease revenue when motorsport events are not being staged.

The future of Westwood Motorsport Park is also uncertain. The facility is now operated under a one-year lease from the Government of British

Columbia (the Ministry of Lands, Parks and Housing) by the Sports Car Club of B.C. (S.C.C.B.C.). This lease was due to expire at the end of 1984 but has been renewed for the 1985 season.

Inevitably the road course located on the Westwood Plateau will, in the short-term, need to be moved. The area is zoned for residential development and significant gravel reserves are located on the property as well.

Uncertainty concerning the future of Westwood Motorsport Park, and the short-term nature of future lease extensions, has led to restrictions on facility development. Appropriate levels of investment cannot be made to improve and upgrade existing facilities since an eventual relocation date is not known. Any major investments have to be avoided since relocation is considered inevitable.

Attendance statistics at Westwood Motorsport Park do not reveal the dramatic decline experienced at other Lower Mainland motorsport facilities. They are, however, sensitive to the future status of the track and would decline dramatically if new facilities are not developed. Recent comparative attendance statistics at Westwood are summarized in Exhibit IV-3.

EXHIBIT IV-3 Comparative attendance statistics at Westwood Motorsport Park

Year	Event	Approximate attendance (Person Days)
1979	Trans Am/Formula Atlantic	12,000
1984	Formula Atlantic	6,000
1984	All regional and club events	Avg. = 1,000

The decline in major event attendance between the late 1970's and 1984 can be attributed, in part, to the following:

- The 1979 event combined two significant races while in 1984, only one Formula Atlantic race was held.
- The recent economic recession has likely had a negative impact on the willingness of motorsport spectators to cover the expenditures necessary.

- Promotional money for events in recent years has been more limited.
- Corporate sponsors are less willing to participate due to the uncertain future of the facility.
- Existing facilities require more improvement now than five years ago.

The above activity statistics do not include those individuals who actually participate in the events listed. During 1984, for example, most driving teams involved in regional and club events involved at least four participants in addition to the driver. This represented an additional activity level at an average event of that type of 870 person-days. The equivalent additional level of activity at the Formula Atlantic race in 1984 was 1300 person-days.

Activity at Westwood includes motorcycle races on the road course as well as go-kart races on the road course and on the go-kart track. Detailed breakdowns of attendance by event are not available for these events. However, eight motorcycle races were held during 1984 which generated an average of 1,800 spectator-days and 420 participant-days per event. Three go-kart races on the road racing course resulted in about 1,000 spectator-days and 700 participant-days per event. The comparable statistics for nine go-kart events held on the smaller "sprint-track" during 1984 are estimated at 500 spectator-days and 300 participant-days per event.

While detailed statistics are valuable in identifying trends and forecasting future utilization, the reader should recognize the overall activity level associated with motorsport events at Westwood. The 1984 season is estimated to have generated approximately 45,000 spectator-days and over 15,000 participant-days. This excludes track workers not directly involved in driving teams, driver training schools and a number of small slalom, solo and sprint events held at the club level.

Improved facilities and long-term security for a road racing course would generate significantly higher levels of activity. Westwood Motorsport Park has a number of physical constraints such as access roads, parking capacity, bleacher capacity and pit area capacity which, if removed, would enable larger numbers of both spectators and participants to become involved in major events. These issues are incorporated into the analysis of motorsport centre utilization in Chapter VI of this document.

B. LOWER MAINLAND RESIDENT INVOLVEMENT IS SUBSTANTIAL

A market survey of Lower Mainland residents was carried out as an integral part of this study. Details of the approach used and the results achieved are included in Appendix E. Key results of the survey are summarized in the following paragraphs.

1. General participation in motorsport is higher than expected

The aggregated market research findings indicate that 18 per cent of Lower Mainland residents had either attended or watched some motorsport event over the past two years. Exactly equivalent data is not available elsewhere. However, although reports indicate that motorsport is amongst the most popular spectator sports in North America; until now it was not known whether significant levels of interest existed in British Columbia. The 18 per cent level of interest and involvement uncovered during the market research confirms that the sport is extremely popular here as well.

Most of the Lower Mainland residents who have watched or participated in some form of motorsport activity are male, between 18 to 34 years of age and single as can be seen in Exhibit IV-4. Research of non-competitive motorsport enthusiasts and their involvement in picnics, swap meets and the like also indicates that a strong level of family participation also exists in these types of events.

EXHIBIT IV-4 Profile of residents involved in motorsport

		Proportion of respondents who indicated involvement
o Sex	- Male	49.8%
	- Female	31.6%
o Age	- 18 - 34 years	51.9%
	- 35 - 54 years	28.8%
	- 55 and older	24.4%
o Marital status	- Single	54.1%
	- Married	31.0%

Amongst Lower Mainland residents who indicated they have never been involved with motorsport, 82 per cent stated that they were either **not very**

interested or **not at all interested** in becoming a spectator or participant in the future. This leaves, however, 18 per cent of those who have not been involved (.. or approximately 15 per cent of the Lower Mainland population..) who have indicated some interest in becoming involved or watching motorsport activity. It can be interpreted that this group of people represents a potential market for the sport that has, as yet, been untapped. This market segment tended to come from younger, single, higher income (i.e. $30,000+/annum and more) households.

Virtually all (i.e. 91 per cent) of those respondents who had some involvement with motorsport over the past two years had watched at least one motorsport event on television. About 44 per cent of those interviewed within this group had attended a motorsport event or show in person. This translates to an approximate attendance rate at motorsport events and shows for Lower Mainland residents of 8 percent. Again, those who attended actual motorsport activities were dominated by single males falling into the younger age category. Attendance by females and people within other age categories was, however, not insignificant.

These statistics demonstrate, from an overall perspective, that direct participation in or attendance at motorsport activities is significant. They further illustrate that overall interest in motorsport is extensive since many people watch events on television but have not attended events in the last two years. This portion of the population which becomes involved in motorsport through watching television represents another substantial market segment which could, potentially, be attracted to a new motorsport centre.

2. Some Motorsport events are more popular than others

A wide variety of competitive motorsport events are available on television. Road racing and oval track racing appear to be events which attract the largest proportion of television spectators. Drag racing, along with motorcycle racing and motocross events, are the second most popular type of events on T.V.

Just as viewership of individual motorsport events is dependent on the frequency and availability of televised programs, so too is the likelihood of having attended a given event over the past two years is a function of where, and how often, that event was staged. Demolition derbies and tractor pull events are the two most popular motorsport-oriented spectator events in the Lower Mainland. Over 60 per cent of respondents are likely to have attended one of these two events on the last occasion they attended a motorsport event in person.

Road racing and oval track racing take second position in terms of popular events which were attended over the past two years (representing 30 per cent and 31 per cent respectively of respondents who had attended a motorsport event over that period). The comparative proportion who attended a drag racing event was 20 per cent which is a reflection of the lack of appropriate facilities for drag racing in the Lower Mainland at the present time.

A summary of event popularity is provided in Exhibit IV-5. Percentages shown indicate the proportional involvement in various motorsport events for those who watched events on television and those who attended the event in person over the last two years. The exhibit also provides a breakdown of this sample based on the last event attended.

EXHIBIT IV-5 Current Lower Mainland popularity of motorsport events

Type of event	Proportion of respondents who indicated involvement in specific events		
	Watched on television	Attended over the past 2 years	Last event attended
• Auto road racing	88%	30%	8%
• Oval track racing	72%	31%	13%
• Drag racing	59%	20%	9%
• Motorcycle racing	53%	26%	5%
• Motocross	51%	25%	5%
• Demolition derbies	42%	45%	18%
• Motor boat racing	38%	6%	2%
• 4-Wheel drive events	26%	28%	12%
• Hill climbs	25%	5%	0%
• Tractor pulls	24%	41%	28%
• Road rallies	20%	5%	2%
• TOTAL	N/A	N/A	100%

Examination of the above data should take into consideration its relevancy to the nature of existing motorsport facilities in the Lower Mainland. The last four types of events, i.e. four-wheel drive events, hill climbs, tractor pulls and road rallies, do not generally take place at Action Raceway, Mission Raceway or Westwood Motorsport Park. Tractor pulls, for example, used to be held at the P.N.E. grounds and are now staged at B.C. place. The interest level in these types of events, however, is important to the overall level of recognition of motorsport by Lower Mainland residents and therefore their tendency to attend events at a new motorsport centre.

Although the motorsport audience is predominantly male, interest in watching motorsport events on television was expressed by about one-half of the female residents. Television viewing preferences differed between males and females however. It is evident, for example, that more males like to watch motorcycle racing, motor boat racing, four-wheel drive events and hill climbs than do females. The most popular motorsport events on television for females include road racing and oval track racing. The female population also appears to enjoy attending demolition derbies. Drag racing attracts a large following as well, particularly among younger spectators (i.e. those within the 18 to 34 age bracket).

Interpretation of the numbers of Exhibit IV-5 indicates some correlation between events watched on television and those which were attended in person over the past two years. Those who watch road racing and drag racing on television, for example, also attend these types of events in addition to motorcycle races. Television spectators of drag race events, on the other hand, have attended a variety of other events in person including road races, oval track races, demolition derbies and motocross events. Television motocross fans have attended both motocross events and motorcycle road races in person.

In summary, some motorsport events are more popular than others. All have, however, a distinct and recognizable following. The most popular events identified by Lower Mainland residents are as follows:

- Road racing.
- Drag racing.
- Motocross.
- Oval track racing.
- Tractor pulls/demolition derbies/four-wheel drive events.

Motorsport related events of a non-competitive nature which are highest in popularity in the Lower Mainland are as follows:

- Auto shows - 84% of those who have been involved.
- Custom car shows - 65% of those who have been involved.
- Parades - 31% of those who have been involved.

Finally, those people who have attended a motorsport event over the past two years indicated they had attended existing facilities in the following proportions:

- Westwood Motorsport Park - 52%
- Mission Raceway - 46%
- Action Raceway - 32%
- Kent Raceway - 24%
- B.C. Place/P.N.E. - 24%

C. MOTORSPORT PARTICIPANTS ARE HEAVILY INVOLVED IN THE SPORT

One component of our market research was oriented towards those individuals who are directly involved in the competitive aspects of the sport as drivers, crew members and/or track workers. Details of the approach used and the results achieved during this part of the study are included in Appendix "F." Key results of the survey are summarized in the following paragraphs.

1. Participation is high at both B.C. and U.S. events

Survey results indicated that most participants interviewed (69 percent) are directly involved in motorsport events and activities in the Lower Mainland more than fifteen days per year. This statistic is important since it indicates a fairly substantial commitment by those who now participate. Direct participation in U.S. events was found to be significant as well, although naturally lower than participation at Lower Mainland events. For example, while 29 per cent of the sample indicated no participation at events south of the border, another 29 per cent said they were involved in such events from one to four days per year, 23 per cent indicated participation between 5 and 15 days per year and a significant 19 per cent travelled to U.S. events for more than 15 days every year.

Participation in United States events is a good indication of the cross-border competitiveness and interest of motorsport enthusiasts. Road racing events in the U.S. were most popular, being mentioned by 58 per cent of respondents, followed by oval track events, which was mentioned by 33 percent of those interviewed. Participation in or attendance at United States drag racing events was indicated by 15 per cent of respondents. This proportion is likely very much higher, however, since many drag racing enthusiasts are no longer members of the clubs interviewed.

Most motorsport participants spend one or two days at Lower Mainland events. These same people generally spend two or three days at events held south of the border. Expenditure patterns reflect this difference in length of involvement. Average expenditures for participants in Lower Mainland events, for example, is $90 while the average for U.S. events was found to be $120. It is important to note that these expenditures are for participants and average expenditures for spectators can be expected to be lower.

2. Motorsport participants spend substantial amounts each year

Most people involved in motorsport as drivers or crew tend to spend substantial amounts of money on this recreational pursuit. Exhibit IV-6 summarizes the results of the participant survey concerning annual expenditures for such things as auto parts, supplies, fuel, engine rebuilding, tires and the like.

EXHIBIT IV-6 Annual participant expenditures on motorsport

Average annual expenditure	Portion of participants interviewed (%)
· Less than $1,000	0
· $1,000 to $2,000	7
· $2,000 to $5,000	57
· $5,000 to $10,000	21
· More than $10,000	14
	100

The above statistics are significant. Average annual expenditure for each participant interviewed was about $5,400. Much of the money which is spent on motorsport by Lower Mainland participants finds its way to the United States. This "leakage" results from both participation in U.S. events as well as purchases of parts and services directly from U.S. firms. Expenditure leaving Canada is estimated at $1,675 per participant or close to 30 per cent of that group's annual expenditures on motorsport. The most common types of purchases made from U.S. firms include tires, engine parts and fuel.

D. GENERAL ATTITUDES TOWARDS MOTORSPORT ARE POSITIVE

Overall, public survey results (detailed in Appendix E) indicate that attitudes towards motorsport in the Lower Mainland are positive. For example, 18 per cent of those respondents who had not been involved in motorsport indicated some level of interest in becoming involved in the future.

Some of the research undertaken was oriented towards those factors which are important to motorsport enthusiasts. Residents who had attended, or participated in a motorsport event over the last two years, were asked to rate, on a scale of 1 (not at all important) to 5 (very important), the importance of various factors in making a decision to attend a given event. Results of this research are included in Exhibit IV-7.

As can be seen from the following exhibit, the admission price and the location of the event were the two most important factors on the minds of residents. Also important were factors including the event being held each year and that it feature well known drivers and driving teams. The least important consideration is that the event be locally sponsored.

E. MOTORSPORT PARTICIPATION IN THE U.S. IS A VALUABLE COMPARISON

During the study, research was also undertaken of participation in motorsport by residents in the United States. The research involved an examination of the profile of the audience at a variety of events. This process was difficult since each source of information has different sample sizes and different categories which results in varying degrees of accuracy. Nevertheless, research undertaken in the United States does reveal a distinct pattern which could prove to be instrumental as the process continues towards motorsport centre development in the Lower Mainland.

The approach used to assemble relevant data from the United States and the detailed results of this research are included in Appendix G. Key findings of this research are summarized in the following paragraphs.

1. Major race events attract a desirable element of the population

Statistics collected concerning attendance at U.S. events indicate that the audience is generally affluent, in the 22 to 39 age bracket, well educated and not at all hesitant when it comes to spending on motorsport events. Most road circuit enthusiasts (i.e. 83 percent) have completed at least some college while 48 per cent of oval track spectators have a household income between $25,000 and $50,000 U.S.

EXHIBIT IV-7 Importance of decision factors in attending events

Decision Factors	Average "Importance Rating"
• Admission price be comparable to a movie or similar entertainment	4.03
• Event to be close to residence for a day trip	4.00
• Event to be held each year	3.47
• Event feature well known drivers and teams	3.39
• Event be held in a 'world class' facility	3.09
• Event be of national calibre	3.03
• Event be locally sponsored	2.89

2. Spectators will travel to attend events with significant appeal

Much of the information collected indicates that motorsport spectators will travel substantial distances and stay overnight if the racing attraction if sufficiently attractive. Some 57 per cent of oval racing enthusiasts, for example, travel up to 99 miles (one-way) to events while 21 per centtravel between 100 and 199 miles and a significant 14 per cent travel more than 300 miles. Even at the club racing level, the longest distance travelled to an event was indicated at more than 1,000 miles by 34 per cent of those surveyed and more than 250 miles by 75 per cent of those surveyed.

3. Major motorsport events in the U.S. attract large crowds

Numerous examples of major motorsport event successes are available throughout the U.S. The 1984 CART road race in Portland, for example, is estimated[1] to have sold 70,000 day tickets with actual attendance at the event estimated at 58,500 spectator-days. The "Nationals," which is the primary drag race series in North America, was recently reported to have attracted more than 601,000 spectators to the twelve events held during 1984 ... more than 50,000 per event. The "Winter Nationals" in Pamona, California drew 69,413 people in 1983 and it was estimated that 35,000 were on hand on Sunday alone for the event held there early in 1985. Reports indicate that more than 10,000 were turned away at the Sunday finale due to capacity constraints.

Research covering various major events in the United States confirms that attendance is substantial. Average attendance on race-day at various types of major events is summarized in Exhibit IV-8.

The National Hot Rod Association (NHRA) has recently commissioned a drag race audience survey which had not been completed at the time this report was prepared. The examples given above of recent attendance at "National" races are, however, good examples of the popularity of this type of motorsport activity.

EXHIBIT IV-8 Average race-day attendance at major U.S. events

Type of event	Approximate attendance
• Auto road racing	55,000 - 75,000
• Oval track racing	35,000 - 65,000
• Short track racing	10,000 - 20,000
• Club racing	5,000 - 10,000

---

[1] Interviews held with Portland International Raceway Management -- January, 1985

F. THE FUTURE OF MOTORSPORT IN THE LOWER MAINLAND IS UNCERTAIN

The wide variety of data and statistics described above and in the appendices indicates clearly that motorsport is popular, that it has had a well attended past but that its future in the Lower Mainland is uncertain. It is apparent that the major problem faced is one of secure, long-term, quality facilities.

Trends in motorsport activity in the United States are encouraging as is the current level of interest in the Lower Mainland. "National Dragster" recently reported that attendance at all U.S. drag racing events was up 11.2 per cent in 1984 over 1983. These factors indicate that an opportunity does exist to realize increased social and economic benefits from increased activity in British Columbia.

The summary, provided earlier, of problems facing existing motorsport facilities indicates the future of the sport and the industry it supports is uncertain. Since the scope of the opportunity is critical to the decision making process, the balance of this report is devoted to quantifying the demand for motorsport in the future as well as its current and future economic implications for the economy of the Lower Mainland area of British Columbia.

V

ECONOMIC CHARACTERISTICS OF THE MOTORSPORT INDUSTRY

One of the most important objectives of this study was to develop reliable data and information concerning those companies in the Lower Mainland which rely, to at least some extent, on motorsport activity for their business. Research into the motorsport industry has not been carried out previously in British Columbia and little investigation of this sort has been carried out elsewhere. This data, however, is considered to be important to decision makers concerning the economic importance of motorsport in the Lower Mainland. A reliable set of base information is also critical to the forecast of future economic benefits likely to result from motorsport centre development which is discussed in Chapter VIII.

Detailed results of the research undertaken into motorsport industry characteristics and a description of the approach used is included in Appendix H. Important findings are summarized in this chapter.

A. THE APPROACH TO THE RESEARCH HAD TO BE CAREFULLY DESIGNED

It was necessary, during the study, to carefully plan and carry out the economic research required. The scope of the project prevented a general survey of a random sample of Lower Mainland businesses from being carried out. Indeed, such an approach would have been inefficient since specific types of companies are logically more dependent on motorsport activity than others.

1. Research focussed on specific sectors of importance

In conjunction with motorsport representatives, a number of specific business sectors were identified so that research could be focussed on those types of companies which are known to depend, at least partly, on motorsport activity. Three principal business sectors were included in this identification process:

- Automotive oriented companies.
- Motorcycle oriented companies.
- Accommodation, food and beverage oriented companies.

Within these three basic sectors, a total of 151 interviews were carried out to determine base economic information to be expanded. In addition, three interviews with companies that do not fit within these categories were completed. A breakdown of the number of interviews carried out is provided in Exhibit V-1.

EXHIBIT V-1 Economic research interviews by sector

	No. of interviews
Automotive oriented companies	107
Motorcycle oriented companies	20
Accommodation, food and beverage	21
Miscellaneous companies	3
TOTAL	151

It was important, during the research process, to obtain an understanding of important categories of businesses within these three primary sectors of interest. Only in that manner could the research results of the sample be accurately expanded to represent all similar businesses in the Lower Mainland. Analysis carried out indicated that extensive categorization was required within the automotive-oriented sector and that only limited categorization was required within the other two business sectors.

The final categorization used for the economic research and the total number of interviews completed under each category is summarized in Exhibit V-2.

The orientation of research planned was fine-tuned one additional time before interviews were actually carried out. It was suspected, at the outset, that some differences in economic characteristics and motorsport involvement may become evident due to the geographic location of the businesses themselves. Therefore, businesses interviewed within each category were selected from different areas in the Lower Mainland to test this suspicion.

The research orientation necessarily omitted a variety of companies which have some business generated from motorsport. These include firms which supply trophies, souvenirs, advertising, transport, towing, printing, fuel, clothing and safety equipment. Combined, these companies represent an important economic sector which relies to some degree on motorsport. Their individual involvement, however, is estimated to be small relative to those firms researched and the scope of this study precluded detailed analysis in these areas.

EXHIBIT V-2 **Economic research interviews by category**

	No. of interviews
Automotive oriented companies	
Manufacturers	8
Automobile dealers	10
Automotive parts distributors	8
Automotive parts suppliers	31
Automotive servicing - high performance	20
Automotive servicing - general performance	7
Tires	7
Sub-total automotive	107
Motorcycle oriented companies	20
Accommodation, food & beverage companies	
Accommodation	12
Food and beverage	9
Sub-total	21
Miscellaneous companies	3
TOTAL	151

2. Special steps were taken to identify competitive motorsport business

The definition of motorsport is broad and it can be interpreted in various ways. The consulting team recognized at the outset of the work that special attention had to be paid to the economic implications of a motorsport centre and, therefore, of competitive motorsport activity.

Many individuals in the Lower Mainland are involved in improving and modifying their vehicles or motorcycles although they do not become involved in competing at motorsport facilities. This represents a large market for the businesses surveyed.

The questionnaire developed for this part of the study, and the interviewing process implemented, involved carefully worded questions and careful procedures to ensure that competitive motorsport business was separated from non-competitive motorsport business. If this had not been carried out, the results of the work would have been difficult to interpret and could have very well over-stated the economic implications of motorsport facilities.

B. BUSINESSES INVOLVED IN MOTORSPORT HAVE VARIED CHARACTERISTICS

Important results of the economic research carried out are outlined below. Further details are included in Appendix H.

1. Companies are generally small

Results of our research indicate that few companies involved in the motorsport industry are very large. It is also evident that literally thousands of firms in the Lower Mainland depend to some extent on motorsport.

Exhibit V-3 summarizes the gross sales and employment levels of companies researched within the automotive and motorcycle sectors.

Most firms interviewed had gross annual sales of less than $1 million. Many had only three or four employees. The averages indicated in Exhibit V-3 are somewhat misleading in a few instances since they are significantly affected by a number of large companies included in the sample.

Annual gross sales per firm range considerably with manufacturing, automotive servicing and tire firms generally having annual sales of less than $1 million. Motorcycle firms generate similar business volumes which include sales of motorcycles and parts as well as servicing. The firms with the highest annual revenue typically include automobile sales and automotive part distributors. Most of these companies are also wholesalers.

EXHIBIT V-3 Motorsport industry size statistics

Business category	Gross annual sales Range (x $1 million)	Gross annual sales Average (x $1,000)	Employment Range	Employment Average
Automotive companies				
Manufacturing	0.035 - 35	568	1-35	8.5
Automobile sales	1 - 15	6,750	8-60	25.3
Automotive distributors	3 - 50	11,500	5-20	15.4
Automotive parts	0.1 - 6	1,144	1-50	10.8
Automotive servicing - high performance	0.085 - 1	273	1-16	3.4
Automotive servicing - general performance	0.136 - 2	589	2-30	9.0
Tires	0.25 - 1	600	2-15	7.6
Motorcycle companies	0.05 - 5.6	1,343	1-34	6.8

Most firms are not large employers. The average company interviewed generally employs from 3 to 25 persons. These smaller employment figures are most closely associated with the high performance servicing firms while the larger employment figures relate to automobile sales with their extensive roster of salesmen. Automotive parts and distributor firms typically employ more than ten persons.

2. Companies do not rely on competitive motorsport as their primary market

Information collected from automotive and motorcycle oriented companies concerning their reliance on competitive and non-competitive motorsport activity is summarized in Exhibit V-4.

Very few racing related vehicles are bought directly from automobile sales offices. Those businesses which rely most heavily on competitive motorsport activity include automotive distributors as well as high performance servicing, tire and motorcycle companies. Manufacturing firms also have a significant percentage of business volume related to competitive motorsport but there are very few firms within that category. The percentage of business related to general motorsport activity in all cases exceeds 4% and in most cases is more than 14% of the total volume of sales.

EXHIBIT V-4 Business reliance on motorsport activity

Business category	Average proportion of business dependent on motorsport activity Competitive %	General %
Automotive companies		
Manufacturing	14.4	41.0
Automobile sales	1.7	15.3
Automobile distributors	8.1	8.1
Automotive parts	4.2	4.0
Automotive servicing - high perf.	17.6	35.2
Automotive servicing - gen'l perf.	6.0	9.4
Tires	17.5	15.1
Motorcycle companies	23.0	14.5

Businesses within different categories indicated strikingly different levels of dependence on different types of motorsport activity. Small manufacturing firms, for example, indicated that drag and road racing accounted for most of their motorsport business while automobile dealers indicated that road racing enthusiasts are their primary source of motorsport sales. Most companies interviewed indicated that road racing, oval track racing and drag racing all account for an important part of their competitive motorsport business. Motorcycle oriented companies indicated, overwhelmingly, that motorcycle road racing was the most important part of their motorsport business.

3. The profiles of motorsport business vary by type

a) Manufacturers. Automobile or related manufacturing in the Lower Mainland is currently a small industrial activity. Of the businesses which have been established, a majority manufacture components primarily for trucks. A few of these firms, however, are automobile oriented and also have a motorsport bias. There are currently no major automobile manufacturers in the Lower Mainland.

Of the key automobile distributors which operate in the Lower Mainland, only Honda Canada Inc. provides a factory-ready racing vehicle. For racing activity in the summer of 1985 at Westwood, Honda Canada is hoping to sell a minimum of six Honda racing vehicles which, when prepared, will each have a value of approximately $8,000. By 1986 the company anticipates that it will sell at least twelve vehicles per year for entry into a special division at Westwood. These vehicles are not manufactured locally but there is a certain amount of local preparation such as the installation of roll-cages.

Locally, two or three small firms manufacture racing vehicles. Thomas E. Johnson Engineering of West Vancouver is the only builder of circuit race cars for competition in the Formula Atlantic Class which competes at Westwood. This is the only firm in Western Canada building such a vehicle although these types of cars can be imported from the United States. Davenport Fabrication of Port Moody is in the business of building drag race cars. Both of these are very small businesses with much of their work handled on a custom basis. Few if any vehicles are built on spec.

Most other manufacturing is related primarily to parts fabrication. The largest firm of this type in the Lower Mainland is Ebco Industries Limited in Richmond, a manufacturer of custom wheels. Its automotive component is large by B.C. standards but represents only a small part of its total business. Approximately 35 individuals are employed in Ebco's automotive-related products section. Drag racing is the most important type of motorsport for this firm.

R.A.S. Industries Limited of Vancouver is a manufacturer of auto parts such as axles, floating rear ends, and other similar components which are primarily used for drag related vehicles. The company also has a general machine shop repair facility. A similar but slightly smaller firm is Greens Automotive of Richmond which carries out high performance fabrication of roll-bars and wide wheels as well as suspension system lowering. Circuit and drag racing as well as four-wheel drive activity is important to this company. Currently Greens Automotive is the only major wide wheel manufacturer in the area. Spirit Engineering is another small firm which specializes in the fabrication of roll cages, sheet metal interiors, frames and drag cars.

Typical of some of the other automotive related firms which have some business generated from competitive motorsport is Art Metal Spinning Co. Ltd. of Vancouver. This company has carried out parts fabrication for vintage vehicles.

Of particular interest is Phillips Zimmelman Development Corp. of Burnaby which carries out machining and fabrication for racing vehicles as well as for aircraft. This firm also undertakes research and development and has been developing new engine systems which are on the leading edge for performance drag vehicles in the United States. The company indicated that being located close to a motorsport facility is extremely important for testing purposes.

b) Automobile dealers. Most automobile dealers derive at least 40% of their gross revenue from vehicle sales. Since they carry expensive vehicle inventories, annual sales are frequently of $4.5 million or greater. Small import-related firms have sales as low as $1 million annually. Automobile dealers also compete extensively with the automotive parts firms in supplying auto parts and installing these parts. In most cases, parts sales count for at least 25% of the annual gross sales of these firms.

Relatively little business is derived from competitive motorsport by most automobile dealers according to our research. Generally a maximum of 5% of gross sales is considered to come from this activity. Some of this is derived from the sales of standard sedans which are known to be used by the purchasers for sedan racing classes at places such as Westwood.

c) Automobile parts distributors. Automobile parts distributors are the primary importers of parts and are wholesale distributors to a wide range of businesses in the Lower Mainland. They tend to be medium-sized firms with annual sales averaging $11.5 million but ranging from $3-$50 million. The majority indicated that only a small component of their sales up to 5%, relate to competitive motorsport. General motorsport, however, was estimated to account for up to 50% of the annual sales volume in these firms.

Firms such as Keystone A.A. Industry of Richmond and Dix Performance Ltd. of Burnaby are two well-known local distributors which concentrate more on the motorsport market than do other companies. Keystone is primarily a wheel distributor for its parent company, Ebco Industries. All of its sales are essentially generated from motorsport in one form or another. Dix Performance is an importer and distributor of auto parts for local specialty repair facilities. The company reports that over half of its business is oriented to motorsport. When the paved drag strip was in operation at Mission, Dix Performance had over 50% of its business directly related to competitive motorsport activity.

For most auto part distributors, motorsport is an important stimulus to business. Drag and circuit racing appear to account for most motorsport related sales. Most distributors attribute little importance to being located near a track.

d) Automobile parts retailers. Some automobile parts firms are 100% wholesale oriented while others have a retail component or even a servicing dimension. In most cases, parts sales account for at least 50 to 60% of annual sales volume. A few parts companies are very small with sales approaching $150,000 annually. Most, however, have sales in excess of $1 million annually with some reporting gross revenue as high as $6 million.

For most of these companies, motorsport related sales are relatively unimportant. For example, Canadian Tire stores tend to rely only marginally on competitive needs. On the other hand, parts suppliers (e.g. Burnaby Auto Parts Ltd., BarMac Auto Marine Ltd. and Mitchell Automotive) indicated that more than 20% of sales volume can be attributed to competitive motorsport activity. The amount of business related to competitive motorsport could go as high as 60%, as in the case of Mitchell Automotive. Hutco Parts Ltd. estimated that this market accounts for about 35% of gross revenue.

Employment levels within parts suppliers varies considerably. Some very small firms employ from one to four people but a good number employ from ten to twenty people. Some firms indicated no interest in motorsport at all. Where motorsport has been important in generating business, it has primarily been related to circuit and drag racing activity.

e) Automotive servicing -- high performance. The auto servicing business category is the one most directly tied to motorsport activity. The high performance group is dedicated to the sales of high performance parts, welding and fabrication of vehicle parts and vehicles, and specialty vehicle repair and servicing.

High performance auto servicing companies tend to have a very large component of their business related to general motorsport and a variable, but often small, component directly attributable to competitive motorsport. These firms are generally operated by knowledgeable enthusiasts, many of whom have been in business for a number of years. Well known in motorsport circles, the firms typically have low annual sales volume ranging from slightly under $100,000 to approximately $1 million. The majority have total sales of less than $300,000. They tend to be small businesses, usually employing from three to six individuals, with the owners directly involved in operating the company.

Some of these companies (e.g. High Performance Engines Ltd. of Burnaby, Innovative Automotive of New Westminster, Nixon Automotive of Burnaby and Richmond Auto Clinic in Richmond) indicated that between 25% and 50% of their business is derived directly from competitive motorsport. Many of the other businesses which are well-known high performance firms indicated that 10% or less of annual sales is directly attributable to motorsport.

Many of these firms reported that a much higher proportion of their business was attributed to competitive motorsport in the past. In particular, the high performance firms were most severely hurt by the loss of Mission's paved drag facility. In order to survive, many of these businesses increased their dependency on the general motorsport market by enhancing their basic auto repair capabilities. A good number reported that they had to change their type of operations in order to stay competitive and viable. Nearly half of the businesses under this category reported a loss of approximately 50% of their competitive related business when Mission was closed in 1978.

About a third of the businesses interviewed indicated that it would be useful to them to be located near a motorsport facility. This type of company tends to generate most motorsport business from drag racing and circuit racing, followed by oval track and boat racing. Because their markets are not highly diversified, many are vulnerable to changes in the availability of track facilities in the area. Most firms would need to experience a minimum increase of 10 to 25% in business volume to increase staffing levels. Conversely, many would not be able to reduce existing staffing levels and still operate as a viable business.

f) Automotive servicing — general performance. General performance firms are predominantly involved with auto servicing and the provision of parts. Businesses range in size from $150,000 gross sales annually to $2 million.

In general, motorsport is less important to this category of business than to high performance firms. The proportion of business attributed to general motorsport ranges up to 35%.

A total of ten firms interviewed reported that 10% or more of their business can be attributed to competitive motorsport activity. Some of these businesses have experienced a decline in sales, and a lower dependence on competitive activity, since the relocation of Mission Raceway.

Most general performance auto servicing firms are slightly larger than those in other categories with an average employee base of approximately nine persons. Bert's Automotive Transmissions, with 30 employees, is one of the larger general performance firms.

For many of the companies in this category, circuit racing is the most important motorsport activity followed by drag and oval track racing. Many also have an interest in a wide range of other motorsport activities including tractor pulls, driver training and off-road racing.

g) Tire companies. Most tire companies are involved in both wholesale and retail sales as well as some servicing. The size of these companies varies from $250,000 annual sales to approximately $1 million annually.

Certain firms, such as O.K. Tire or Big O Tires, indicated that very little of their business is dedicated to motorsport of any sort. Others, such as Pacific Rim Tire Distributors, claim to generate as much as 85% of their business from motorsport although the vast majority of this is from general motorsport activities.

Two of the more prominent suppliers of tires for competitive purposes include Canadian Cash and Carry Tire Centre in Burnaby and Circuit

Tire Sales and Service Ltd. in Port Moody. In both cases over 50% of business was reported to be derived from competitive motorsport activity. Each company also reported that the motorsport component of their business has decreased over the last few years.

Employment in these companies tends to range from two to fifteen people with the majority having at least seven staff members.

h) Motorcycle companies. In contrast to the automotive businesses, motorcycle firms tend to include a sales component in their operations as well as parts supply and servicing. There are very few motorcycle businesses which operate solely on the basis of providing parts or motorcycle servicing. Consequently, the majority of these companies have annual sales in excess of $1.3 million with some as high as $5.6 million. The very small servicing firms have annual sales figures in the $50-100,000 range.

Full-time employment in motorcycle firms surveyed ranges from one to thirty-four persons. The average was approximately seven.

Motorcycling, unlike general automotive activities, is heavily sport oriented. Only a few businesses specialize in touring motorcycles (such as Harley-Davidson). The majority of the companies indicated that 20-50% of their sales volume is derived from competitive motorsport. This reflects the fact that factory prepared racing motorcycles are commonly available through local businesses. In addition to road racing motorcycles, a wide range of motocross and other types of dirt bikes can be purchased and easily modified to be competitive. Several companies reported that the motorsport part of their business has, in fact, been increasing over the last few years. In general, motorcycle businesses have not faced the same decline in business operations that has been experienced by most automotive businesses.

For most motorcycle businesses, road racing is the most important motorsport activity. Important activities also appear to include motocross and Super-cross, which is an indoor version held at such places as B.C. Place.

C. THE MOTORSPORT INDUSTRY IS RESPONSIBLE FOR MANY JOBS

The profile of various automotive and motorcycle related companies described above was used to estimate the total number of jobs associated with these important motorsport sectors. Employment related to motorsport arising from the accommodation, food and beverage sector was estimated separately based on attendance levels and expectations concerning the proportion of visitors coming to the Lower Mainland to attend motorsport events.

1. Some 3,600 automotive and motorcycle firms are located in the Lower Mainland

The sampling of automotive and motorcycle oriented businesses described above was expanded to determine overall economic characteristics of this component of the motorsport industry. To determine the extent to which the sample should be expanded, a comprehensive listing of businesses in the Lower Mainland was prepared under the categories used during the economic research. Details of the number of companies by category and by geographic area of the Lower Mainland is included in Appendix H.

A total of 3,617 businesses were identified in relevant geographic areas of the Lower Mainland under business categories similar to those described earlier. A summary listing of the number of companies within the automotive and motorcycle company sectors is included in Exhibit V-5.

EXHIBIT V-5 Economic profile expansion list

Business category	No. of businesses
Automotive companies	3,508
Motorcycle companies	109
TOTAL	3,617

The categorization of companies from the overall list of Lower Mainland businesses was evaluated relative to categories used during the economic research. The sample characteristics were then expanded to estimate total employment levels associated with both competitive and non-competitive motorsport activity in the Lower Mainland.

2. Competitive motorsport supports close to 900 automotive and motorcycle related jobs in the Lower Mainland

Base employment characteristics determined through our economic research were expanded based on the number of companies in the Lower Mainland to determine the extent to which employment is supported by both competitive and non-competitive motorsport. The steps used to carry out this expansion and the calculation results during each step of the process are included in Exhibit V-6.

EXHIBIT V-6 Determination of jobs supported by motorsport Page 1 Automotive and motorcycle sectors

Business Category	Average No. Employees	Average % Business to Motorsport		Average No. of Employees/Firm related to Motorsport			Total No. of Companies	Revised Total No. of Companies	Total Jobs due to Motorsport		
		Competitive	General	Comp.	Gen.	Total			Comp.	General	Total
Manufacturing[1]	8.5	14.4	41.0	1.2	3.5		8	8	9.6	28.0	37.6
Automobile[2] Dealers	25.3	1.7	3.6	.4	.9	1.3	346	290	176	261	377
Automobile[3] Parts Distributors	15.4	8.1	8.1	1.2	1.2	2.4	247	198	237.6	237.6	475.2
Automobile[4] Parts Suppliers	10.8	4.2	4.0	.5	.4	.9	351	298	149.0	119.2	268.2
Automobile[5] Servicing High Performance	3.4	17.0	40.0	.6	1.4	2.0	57	57	34.2	79.8	114.0
Automobile[6] Servicing General	9.0	6.0	9.4	.5	.8	1.3	1082	979	48.7	779.2	1266.2

1) Based solely on manufacturers interviewed. There may be more but they are few. Other machining firms which include fabrication are in general servicing.
2) Includes new and used dealers.
3) Includes Automobile Parts and Suppliers - Wholesale and Manufacturers
4) Includes Automoible Parts and Suppliers - retail, used and rebuilt
5) Includes Automobile Racing and Sports Car Equipment
6) Includes Automobile Repairing and Service, automobile radiators - manufacturers, distributors and repairing, automobile machine shop service.

EXHIBIT V-6 Determination of jobs supported by motorsport

Page 2 Automotive and motorcycle sectors

Business Category	Average No. Employees	Average % Business to Motorsport		Average No. of Employees/Firm related to Motorsport			Total No. of Companies	Revised Total No. of Companies	Total Jobs due to Motorsport		
		Competitive	General	Comp.	Gen.	Total			Comp.	General	Total
Tires[7]	7.6	5.0	7.6	.4	.6	1.0	242	218	87.2	130.8	21.8
Motorcycles[8] Sales, Parts and Service	6.8	28.1	13.2	1.9	.9	2.8	122	90	171	81	252
Automobile Painting	3.5	.5	2.0	.02	.07	.09	241	229	4.6	16.0	20.6
Automobile Electrical Services	3.5	1.0	3.0	.04	.1	.14	75	68	2.7	6.8	9.5
Automobile Seatcovers, Tops and Upholstery	5.5	.5	4.0	.03	.2	.23	45	45	1.4	9	10.4
Automobile Restorations and Customizing	2.5	10.0	40.0	.3	1.0	1.3	49	44	13.2	44.0	57.2
Automobile Wheel Alignment, Axle & Frame Repairing	4.5	2.0	3.0	.09	.14	.23	120	96	8.6	13.4	22.0
Automobile Body Repairing & Body Shop Equipment Supplies	7.5	.5	4.0	.04	.3	.34	536	482	19.3	144.6	163.9
Automobile Wrecking	6.5	4.2	4.0	.3	.3	.6	117	105	31.5	31.5	63.0
						TOTALS	3638	3202	932.2	1981.9	2916.5

---

[7] Includes tire dealers, distributors, wholesalers and manufacturers

[8] Includes motorcycles sales, parts and supplies, repairing and service

In summary, the average number of employees for each category of business was factored by the extent to which that type of business was determined to rely on motorsport activity. The average number of employees supported by motorsport revenue for each business category was then expanded by the number of those companies located within relevant geographic areas. The total number of companies used in this expansion process was down-graded from our original listing to account for overlaps amongst the business listings used.

Our estimates indicate that about 900 Lower Mainland jobs are currently supported by competitive motorsport activity. An additional 1,900 jobs are supported by general motorsport revenue to these companies which is related to motorsport interest but not competitive involvement.

It is important to note that these estimates should not be interpreted, necessarily, as indicating that 900 jobs would be lost if competitive motorsport activity ceased. Most companies, as can be seen from Exhibit V-6, can relate only a fraction of a job to competitive motorsport. Thus, a complete stop to competitive racing in the Lower Mainland would likely have a significant negative impact on existing jobs and existing businesses, but it would not necessarily result in an immediate loss of 900 jobs.

The implications on the close to 2,000 non-competitive motorsport supported jobs from track closure are also uncertain. From one point-of-view, should competitive motorsport be stopped altogether, it could be argued that none of these jobs would be lost. On the other hand, it could also be argued that general interest in motorsport is strengthened by competitive activity and would therefore decline should race events no longer be held.

3. **Accommodation, food and beverage jobs related to competitive motorsport are geographically sensitive**

Research carried out has shown that accommodation facilities as well as food and beverage outlets benefit from major motorsport events at the time they are held if the facilities are located close to the track involved. To determine the extent to which food, beverage and accommodation sales support employment in the Lower Mainland, we extrapolated approximate expenditure levels for that portion of the total number of spectators from out of town estimated to attend events presently staged in the Lower Mainland. Principal elements of this calculation are summarized in Exhibit V-7.

EXHIBIT V-7 Determination of accommodation, food and beverage sector revenue from motorsport event visitors

Type of event	Lower Mainland Attendance 1984 (spectator days)	Estimated out-of-town proportion	Out-of-town attendance (spectator days)	Average sector expenditure	Sector revenue generated
Drag racing	2,000	10%	200		
Oval track racing	18,000	10%	1,800		
Automobile road racing	24,000	20%	2,400		
Motorcycle road racing	14,000	20%	2,400		
Off-road racing	--	N/A	--		
Motocross	1,000	5%	50		
Go-kart racing	8,000	5%	400		
Total	67,000	Wtd.Avg.= 15%	9,650	$23.60	$228,000

Exhibit V-7 indicates that close to $230,000 is presently spent on accommodation, food and beverage by out-of-town visitors attending motorsport events in the Lower Mainland. This rather low level of expenditure in this sector results from the relatively limited number of motorsport events with national or international appeal at the present time. As is described later in this report, however, significant increases in tourist spending is anticipated once the proposed motorsport centre becomes operational.

Current accommodation, food and beverage expenditures by out-of-town visitors can be segregated into that component of the expenditure which support wages and salaries. Using a 40% factor, some $91,000 presently goes to support existing jobs. At an average annual wage of $15,000 it is concluded that only about six full-time jobs are supported by out-of-town spectator expenditures on non-track food, beverage and accommodation. Expenditures at the motorsport facility itself during the event are excluded from this calculation. The jobs which this on-site expenditure supports are incorporated into operational benefits likely to be generated by the motorsport itself.

D. THE FUTURE FOR MOTORSPORT RELATED BUSINESS COULD BE OPTIMISTIC

1. Motorsport in the Lower Mainland has been bigger business in the past

It would appear that the heyday of motorsport business development was during the period from 1976 to 1978. These years coincided with rising business expectations, increases in disposable income, and a general sense of well-being among much of the population. On the whole, the era was characterized by a high sense of optimism.

During the late seventies, many businesses, particularly those in the high performance servicing or auto parts areas, had considerably more employees. In some cases, staffing levels were 3 or 4 times higher than what they are today.

A decade ago, the nature of businesses serving the motorsport market was different. In many cases they had a higher portion of their business dedicated to competitive motorsport. Often this was because the owners were personally involved in motorsport activities. There were even some efforts made towards manufacturing; during this period the wheel industry in British Columbia was established.

The loss of the paved drag strip when Mission Raceway relocated in 1978 meant an abrupt drop in business for many high performance companies. Most of the high performance companies whose work was related to drag racing reported a business decline ranging from 25% to 50%. In some cases these businesses have been able to redirect their market efforts and have maintained reasonable growth since the downturn. Others, however, suffered not only a loss of sales volume but also a considerable decline in employment.

Two other major factors have influenced the health of these businesses. These include the Federal Government Oil Pricing Policy, which has steadily increased the price of gasoline, and the economic recession which began in 1981. Gasoline price increases have been particularly important for all motorsport related businesses. The high cost of fuel caused difficulties for those involved with the sport when combined with the loss of job opportunities that has been so apparent since 1981. Vehicles frequently have been driven minimal distances or, in fact, have been put into storage. This has contributed to lower business volumes, especially for high performance servicing companies.

A further consequence of the loss of a paved drag strip has been the decline in the actual number of participants in drag racing. Most serious competitors must now go to the United States, particularly to places such as Seattle or Portland. For those who cannot afford regular trips south, there are few local outlets for drag related activities. Sand drags which are now held at Mission Raceway but they involve less expensive, less professional vehicles. On the whole, far less money is spent on drag related activity in the immediate area than was the case during the mid-seventies.

2. Every category of business anticipates increased growth with the development of a Lower Mainland motorsport centre

Of the manufacturers consulted, most anticipated an increase in business in excess of 20% should a motorsport centre be built. Manufacturers, especially machinists and fabricators, feel that considerable work would go immediately into the updating of existing vehicles which would then be followed by regular maintenance programs.

Because of current uncertainty, many race car owners have neglected to do any further updating, an activity which would be required to make their vehicles fully competitive. In other cases, whole new lines of products could be introduced. Some firms are already doing the research and development on items which could be produced in British Columbia if the market were somewhat larger. Automobile dealers expect an increase (less than 10%) in business should a motorsport centre be developed. Likewise, automotive part distributors also expect an increase in sales generated from a new complex with figures generally falling between 10% and 20%.

High performance automotive servicing firms expect to realize extensive benefits from the development of a motorsport centre. Most of these companies estimated that their business would increase from 15% to 30% in the first year of operation and by up to 50% after two years. Smaller companies anticipate a doubling of sales while other firms anticipate a change in the nature of their business with a greater emphasis on the competitive market.

General performance automotive servicing firms also expect to see an increase in business should a motorsport centre be developed. A few of these businesses currently have little to do with motorsport but recognize that they could develop a motorsport component. Auto parts firms generally do not anticipate any noticeable increase in business with a motorsport centre. Generally the level of increase is expected to be between 10% and 20% although a few small businesses (e.g. those with sales under $150,000) anticipated that business could actually double.

Tire firms which do not sell to the motorsport market at the present time also could see little increase resulting from a centre. In contrast, firms that now serve that market anticipate an increase of at least 20%. One firm which is involved in motorsport in Eastern Canada felt that motorsport on the west coast could eventually account for 50% of its gross business should a centre be developed.

Over half the motorcycle businesses interviewed felt that a 20% increase in business could be generated, at a minimum, with a motorsport centre. The remainder generally felt that a 10% increase would be realized. Several qualified their comments depending upon where the centre is located.

In summary, in all motorsport-oriented business categories, businessmen indicate that a Lower Mainland motorsport centre would be a significant impetus to business volume.

3. A wide range of new business opportunities would be encouraged with a motorsport centre

With the development of a high calibre motorsport centre and, above all, the introduction of stability into the motorsport world of the Lower Mainland, a wide range of new products may be created or developed in British Columbia. Presented in Exhibit V-8 is a list of the business opportunities identified during our research. Typically they include the production of parts now made in the United States such as cam-shaft profiles, tension components or traction bars. There would also likely be additional sales of items such as the special racing Honda or some motorcycles.

Of particular interest is the support which a motorsport centre would provide to firms involved in research and development for high technology components related to motorsport. These items could be marketed competitively in the United States as well as other market areas.

4. The future is uncertain

Many of the companies most closely aligned to motorsport activity, such as those in the high performance field, are already close to being marginal businesses. These firms suffered significant losses in operating size and capabilities over the last seven years. Active participants and enthusiasts have held back on investment in new vehicles and the updating of existing racing machines. The loss of a paved drag strip was quite dramatic in its effect on local businesses. The loss of Action Raceway is expected to have a similar, although less severe, effect. A number of companies in the survey identified that they anticipate a drop off in business volume of about 10% as a result of the closing of Action Raceway.

EXHIBIT V-8 Business opportunities identified in the survey

- Chassis building, superchargers and supercharger drives
- Suspension components
- Overdrive and underdrive transmissions
- Quick change rear ends
- Traction bars
- Exhaust equipment
- Roll-bar systems; roll cages
- Headers
- Electronic ignitions
- Fibreglass products
- Cam-shafts
- Suspension accessories (shocks, springs, traction devices)
- Engine swap kits
- Aluminum castings (manifold, rocker covers)
- Air cleaners
- Timing colours
- Gaskets (metal, corbestos, asbestos, copper)
- Oil pumps
- Dry sumps
- Lenco transmission pieces
- Chroming of cam-shafts
- Engine dynamo (testing machine)
- Kit cars
- Frame kits
- Pre-cut tubing

A variety of firms, particularly those in the motorcycle category, indicated that they feel a sense of uncertainty with regard to the future of Westwood. For the motorcycle contingent, Westwood is by far the most important motorsport facility and its future is, at best, uncertain.

Although the recession in Canada is continuing, it is expected that the worst is over. Adjustments have been made to the price of gasoline and, in fact, this is reflected in substantial sales of greater efficiency vehicles. The most important uncertainty that many Lower Mainland businesses face is the future of motorsport facilities and the extent to which motorsport activity will increase or decline in the years ahead.

E. DIRECT ECONOMIC BENEFITS DERIVED FROM MOTORSPORT APPROACH $100 MILLION

The economic analysis carried out included careful evaluation of not only the jobs related to motorsport, but also the income generated within non-wage sectors of the economy. The approach to this analysis was similar to that used to estimate employment associated with competitive motorsport.

In summary, the approach takes into account that those expenditures which are generated by competitive motorsport activity accrue as revenue to a variety of companies and businesses in the Lower Mainland. This revenue is then used to support business operations. The economic benefits directly derived from competitive motorsport revenue can be classified into three main categories as follows:

- Wages and salaries.
- Purchases of goods and services.
- Profit and taxes.

The extent to which Lower Mainland jobs are supported by competitive motorsport expenditures was summarized earlier in this chapter. The factors and calculations used to estimate direct economic benefits associated with purchases of goods and services and with profit achieved and taxes paid are summarized in Exhibit V-9 for both competitive motorsport expenditures and general motorsport expenditures.

Leakage is generated due to the fact that many motorsport-oriented companies import a large volume of materials and supplies from outside of British Columbia. This factor was taken into account during the evaluation of economic benefits. It is estimated for each business category in Exhibit V-9.

EXHIBIT V-9 Calculation of direct non-wage benefits

Business Category	Average Gross Sales ($)	Average No. of Employees	Average Wages/ Employee	Average Estimated Wages/ Business	Estimated Profit & Taxes/ Business	Estimated Expenditure on Purchases	Leakage outside B.C. Economy		Estimated Total Purchases Within B.C. Economy/ Business	Average % of Business to Motorsport		Revised No. of Companies	Total Purchases Locally Attributable to Motorsport			Total Profit & Taxes Attributable to Motorsport		
							%	Value		Comp.	General		Comp.	General	Total			
Manufacturing	$ 368,000	8.5	$23,000/ year	$196,000	10% = 37,000	$ 315,000	28%	$ 88,000	$227,000	14.4	41.0	8	$ 262,000	$ 765,000	$ 1,007,000	$ 66,000	$ 187,000	$ 253,000
Automobile Dealers	$ 6,750,000	25.3	$25,000/ year	$633,000	20% = 1,350,000	$4,767,000	85%	$4,052,000	$715,000	1.7	3.6	290	3,525,000	7,465,000	10,990,000	6,656,000	14,094,000	$ 20,750,000
Automobile Parts Distributors	$11,500,000	15.4	$21,600/ year	$333,000	20% = 2,300,000	$8,867,000	90%	$7,980,000	$887,000	8.1	8.1	198	14,225,000	14,225,000	28,450,000	36,887,000	36,887,000	73,774,000
Automotive Parts Suppliers	$ 1,163,750	10.8	$19,500/ year	$210,600	20% 229,000	$ 704,000	90%	$ 634,000	$ 70,000	4.2	4.0	298	876,000	834,000	1,710,000	2,866,000	2,730,000	5,596,000
Automobile Servicing High Performance	$ 273,000	3.4	$23,400/ year	$ 80,000	10% = 27,000	$ 166,000	53%	$ 88,000	$ 78,000	17.0	40.0	57	756,000	1,778,000	2,534,000	262,000	616,000	878,000
Automobile Servicing General Performance	$ 588,500	9.0	$25,680/ year	$231,000	20% = 59,000	$ 298,000	40%	$ 119,000	$179,000	6.0	9.4	974	10,461,000	16,389,000	26,850,000	3,448,000	5,401,000	8,849,000
Tires	$ 600,000	7.6	$18,150/ year	$138,000	20% = 120,000	$ 342,000	90%	$ 308,000	$ 34,000	5.0	7.6	218	370,000	563,000	933,000	1,308,000	1,988,000	3,296,000
Motorcycles, Sales, Parts and Service	$ 1,343,000	6.8	$19,760/ year	$134,000	20% = 269,000	$ 940,000	85%	$ 799,000	$141,000	28.1	13.2	90	3,566,000	1,675,000	5,241,000	6,803,000	3,196,000	9,999,000
Automobile Painting	Est. $ 300,000	3.5	$28,000/ year	$ 98,000	15% = 45,000	$ 157,000	50%	$ 79,000	$ 78,000	.5	2.0	229	89,000	357,000	446,000	51,000	206,000	257,000
Automobile Electrical Services	Est. $ 400,000	3.5	$25,000/ year	$ 88,000	15% = 60,000	$ 252,000	60%	$ 151,000	$101,000	1.0	3.0	68	69,000	206,000	275,000	41,000	122,000	163,000
Automobile Seat Covers, Tops & Upholstery	Est. $ 300,000	5.5	$23,000/ year	$127,000	10% = 30,000	$ 143,000	70%	$ 100,000	$ 43,000	.5	4.0	43	10,000	77,000	87,000	7,000	54,000	61,000
Automobile Restoration & Customizing	Est. $ 200,000	2.5	$26,000/ year	$ 65,000	15% = 30,000	$ 105,000	70%	$ 74,000	$ 31,000	10.0	40.0	44	136,000	546,000	682,000	132,000	528,000	660,000
Automobile Wheel Alignment Axle & Frame Repairing	Est. $ 300,000	4.5	$25,000/ year	$113,000	15% = 45,000	$ 142,000	60%	$ 85,000	$ 57,000	2.0	3.0	96	109,000	164,000	273,000	86,000	130,000	216,000
Automobile Body Repairing & Body Equipment & Supplies	$ 200,000 to $ 300,000	4.0	$25,000/ year	$100,000	15% = 38,000	$ 112,000	70%	$ 78,000	$ 34,000	.5	4.0	482	82,000	656,000	738,000	92,000	733,000	825,000
Automobile Wrecking	$ 200,000	5.5	$20,000/ year	$110,000	15% = 30,000	$ 60,000	60%	$ 36,000	$ 24,000	4.2	4.0	117	118,000	112,000	230,000	147,000	140,000	287,000
												GRAND TOTAL:	$34,654,000	$45,792,000	$80,446,000	$58,852,000	$67 012,000	$125,864,000

The direct economic benefits currently realized in the Lower Mainland from competitive and general motorsport activity are summarized in Exhibit V-10.

EXHIBIT V-10 Economic benefits from motorsport activity -- (1985 dollars)

Type of Direct Benefit	Competitive	Non-Competitive	All Types
Purchases of goods and services within B.C.	$35 million	$46 million	$ 81 million
Accrual of profits in B.C. and payment of taxes	$59 million	$67 million	$126 million
Sub-Total	$94 million	$113 million	$207 million

The overall benefit levels identified above result from the purchase of local goods and services and the generation of profit and taxation. For competitive motorsport activity, we estimate these direct benefits to be about $90 million. The jobs supported by competitive motorsport also have a real economic value. The employment conclusions developed earlier in this chapter are estimated to translate to between $15 million and $20 million of direct economic benefit to the Lower Mainland.

We conclude, therefore, that the overall direct economic effect of competitive motorsport activity in the Lower Mainland, at the present time, is in the range of $100 million annually.

VI

EXPECTED MOTORSPORT CENTRE UTILIZATION

A significant amount of market research was undertaken during this study. This research has resulted in an understanding of the past use of motorsport facilities in the Lower Mainland, the utilization of motorsport facilities elsewhere and the interest and participation in motorsport by Lower Mainland residents.

Market information and event attendance information collected was used to develop forecasts of spectator and participant utilization of the proposed motorsport centre. These forecasts were prepared on the expectation that the operational and physical characteristics of the centre would generally parallel those described in Chapter III and Appendix C of this report. Forecasts and the assumptions which were used to project utilization are described in this chapter.

A. OTHER MOTORSPORT FACILITIES HAVE PROVEN SUCCESSFUL

Each of the three existing facilities in the Lower Mainland have proven successful in attracting large numbers of participants and spectators to events held in the past. In the early seventies, for example, Westwood attracted about 12,000 spectators to a combined Formula Atlantic/TRANSAM race over a weekend. Statistics summarized earlier indicated that Mission Raceway attracted 7,100 spectators to the World Championship Series meet held in 1972 and Action Raceway drew 4,500 people to the one-day Open Competition event in 1972.

These major event achievements in the Lower Mainland need to be acknowledged but also need to be interpreted relative to the demand for motorsport in the past. Indicators show that all types of motorsport have increased in popularity throughout North America over the past decade. Research carried out during this study confirms a strong interest in motorsport by the general population in the Lower Mainland.

Most available information from outside of the Lower Mainland is oriented towards major events which have been held. It is important to recognize that participation and spectator attendance at major events is critical to the financial status of the proposed motorsport centre. The national and international competitions that would be staged are the ones which will generate the greatest revenue for the centre and the greatest economic benefits for the Province.

Statistical information collected from motorsport events held outside of the Lower Mainland was taken into careful consideration during the forecasting procedure due to the above reasons. The greatest successes appear to have been experienced from facilities which have been established for some time and/or which are close to large markets. The proposed centre's reputation will be built-up over time and its attendance will increase as the complex becomes more established. A variety of examples exist, however, where a major event held for the first time has met with considerable success. The CART race held in Portland in June of 1984, for example boosted total facility attendance during the year by 68,500 ... a 53 per cent increase over the previous year.

B. A BROAD SPECTRUM OF MOTORSPORT ENTHUSIASTS WILL TAKE ADVANTAGE OF THE CENTRE

Attendance at and utilization of facilities at the proposed motorsport centre will be associated with major events and with club and regional events to be consistent with the operational objectives of the complex described earlier. There are a variety of factors which affect both the number of competitors and the number of spectators that can be expected to attend each event. Several of the important ones are listed below.

- The scope of the event, the extent of its recognition geographically and the calibre of driving teams and equipment involved.
- The scheduling of more than one event with significant appeal on one race weekend.
- The proximity of and event interest in primary market areas.
- The location of the event.
- The price of the event.
- The scheduling of the event relative to other attractions which compete within the same market.

These factors result in the fact that small club and regional events have less widespread appeal than major national and international events.

Until a motorsport centre is actually developed, an operating schedule is established, and a number of years of experience in attracting spectators and competitors is gained, forecasts must, necessarily, be somewhat speculative. Nevertheless, a variety of realistic development and operational assumptions combined with experience gained by facility operators in the Lower

Mainland, the performance of motorsport facilities elsewhere and an understanding of the Lower Mainland market have enabled reasonably reliable utilization forecasts to be developed. Summary results of these forecasts are provided in the following paragraphs for the following types of competitive activity in the proposed motorsport centre:

- Drag racing.
- Oval track racing.
- Automobile road racing.
- Motorcycle road racing.
- Off road racing.
- Motocross.
- Go-kart racing.

1. Drag racing involvement will take several years to build up

The popularity of drag racing on the Lower Mainland has declined significantly since Mission Raceway relocated in 1978 and proper facilities have not been available since that time. However, past drag activity at Mission as well as research conducted during this study indicates that levels of involvement can become substantial. While successes achieved at major events held in the United States are years away, proper facilities combined with effective promotion and a realistic pricing strategy are expected to generate ongoing growth to participation levels in this type of motorsport

Events likely to be scheduled at the proposed centre have been carefully evaluated. The following considerations have been incorporated into the forecasts:

- A National Championship event, sanctioned by NHRA, is likely once the new centre has been in operation for a full year.
- A World Championship Series meet, again sanctioned by NHRA, would likely be arranged for the first year of operation of the motorsport centre.
- Regional or club events would increase in popularity over time and organizers would bring in attractions with special appeal (e.g. funny cars, wheel standing cars, etc.) at some of these smaller events to boost attendance.

Exhibit VI-1 summarizes the number of events expected to be held at the new drag racing facility, by category, during the first five years.

EXHIBIT VI-1 Drag racing schedule of events

Type of event	Number of events				
	Year 1	Year 2	Year 3	Year 4	Year 5
Major event I (National Championship)	-	1	1	1	1
Major event II (World Championship Series)	1	1	2	2	2
Reg'l./club event I (Special Appeal)	1	2	2	3	4
Reg'l./club event II (Regular)	6	8	10	12	12

The build-up in drag racing events over time is evident from Exhibit VI-1. The schedule shown reflects realistic utilization levels based on current and future popularity.

Exhibit VI-2 summarizes average spectator attendance forecasts for drag racing events. Since some events would be held over a two-day period, forecasts are provided in spectator-days.

Attendance at various events is expected to increase as the popularity of drag racing returns over a three to four year period. Major event attendance estimates are considered to be realistic given that similar events in the United States draw more than twice the numbers shown. Regional and club event attendance is consistent with levels achieved in the past at Mission Raceway. The events and attendance levels shown provide for a growth in spectator utilization of the new track from 15,000 spectator-days in Year 1 to 110,000 in Year 5.

EXHIBIT VI-2 Drag racing attendance forecasts

	Average spectator-days per event				
Type of event	Year 1	Year 2	Year 3	Year 4	Year 5
Major event I	N/A	20,000	25,000	30,000	30,000
Major event II	5,000	8,000	10,000	10,000	10,000
Reg'l./club event I	4,000	5,000	6,000	6,000	6,000
Reg'l./club event II	1,000	2,000	3,000	3,000	3,000

2. Oval track activity will be dominated by smaller events

Oval track popularity is expected to be high but major events held are not expected to draw crowds as large as those associated with drag racing and road racing. This is consistent with present experience and respects the planned size (3/8 mile) of the oval track in the new facility. Some locations in the United States draw enormous crowds at oval track events. The Indianapolis 500 is the most prestigious, most familiar and most successful of these competitions. However, a major investment in an oval track of one mile or more would be required to enable the largest events to be staged. The demand for such a facility on the Lower Mainland is considered to be insufficient for such an investment. However, the smaller 3/8 mile track is expected to generate substantial levels of activity although at a more modest level.

A new oval track would have little difficulty successfully organizing and promoting one or two American Speed Association (ASA) events and one or two NASCAR Grand American events each year. The largest draw would occur with a combined ASA/NASCAR event held annually. The balance of the event schedule would involve club and regional races with a correspondingly lower level of attraction.

Exhibit VI-3 summarizes the events likely to be incorporated into the schedule of the new oval track on a year-by-year basis.

EXHIBIT VI-3 Oval track racing event schedule

Type of event	Number of events Year 1	Year 2	Year 3	Year 4	Year 5
Major event I (ASA/NASCAR)	1	1	1	1	1
Major event II (ASA or NASCAR)	1	2	2	2	2
Regional/club events	9	10	12	12	12

The number of regional/club events projected is consistent with recent levels of activity at Action Raceway but also takes into account the fact that most operational restrictions now imposed would not exist at the new facility.

Exhibit VI-4 summarizes the average spectator participation, on a spectator-day basis, at events projected for the new oval tack.

EXHIBIT VI-4 Oval track racing spectator attendance

Type of event	Average spectator-days per event Year 1	Year 2	Year 3	Year 4	Year 5
Major event I (ASA/NASCAR)	6,000	8,000	10,000	12,000	12,000
Major event II (ASA or NASCAR)	4,000	5,000	6,000	6,000	6,000
Club/regional events	2,500	2,500	3,000	3,000	3,000

Average attendance levels at major events projected above are seen to be considerably lower than for major drag racing events. This is consistent with data available elsewhere for events held on a 3/8 mile oval track. Growth in attendance is expected as the new facility becomes established and its reputation becomes more widespread. Club and regional event attendance levels are consistent with participation levels at Action Raceway in the past.

The forecasts in Exhibits VI-3 and VI-4 translate to a spectator participation growth at the new oval track from 28,000 spectator-days during the first year of operation to 60,000 spectator-days during the fifth year of operation.

3. Automobile road racing will become the most popular activity

Development of a quality, well designed road racing course is expected to generate substantial activity at all levels of involvement. Experience at other facilities of this type indicate clearly that very large crowds can be drawn to well planned and promoted events of national and international calibre. Motorsport interest on the Lower Mainland supports this conclusion. Furthermore, road racing involvement at Westwood as well as strong cross-border rivalries and interest indicate that smaller regional and club events will be well attended as well.

Due to the differences in appeal and the variety of events possible, the major races likely to be held at Westwood have been categorized into three levels. Each is discussed briefly below:

- Major Event I - This would likely involve a CART race in conjunction with another major event such as a TRANSAM race. While advanced planning is required, an event of this nature is expected to be possible during the first year of operation.
- Major Event II - This would likely include two combined events such as a TRANSAM race with a FORMULA ATLANTIC race or an IMSA race on its own. No difficulty is expected in staging such an event during the first year with more than one such event taking place in subsequent years.
- Major Event III - This would likely include a FORMULA ATLANTIC race or a NASCAR WEST race on its own. Little problem in scheduling these events is anticipated although the potential draw of each is lower than the above categories.

Exhibit VI-5 summarizes the expected number of automobile racing events, by category, expected to be held at the new road racing course.

EXHIBIT VI-5 Automobile road racing event schedule

Type of event	Number of events Year 1	Year 2	Year 3	Year 4	Year 5
Major event I (CART/TRANSAM)	1	1	2	2	2
Major event II (TRANSAM/ FORM ATLANTIC)	1	2	2	2	2
Major event III (FORM ATL. or NASCAR W.)	1	1	2	2	2
Regional events	7	8	10	10	10
Club events	10	12	14	14	14

The number of events likely to be scheduled for the auto road racing course is expected to be higher than for any of the other facilities planned. Regional and club events will dominate the schedule but the major events can be expected to draw very large crowds.

Exhibit VI-6 summarizes the forecasts prepared during this study for auto road racing events. The forecasts are based on statistics available from Westwood Motorsport Park and actual attendance levels achieved elsewhere during similar events.

EXHIBIT VI-6 Automobile road racing spectator attendance forecasts

Type of event	Average spectator-days per event Year 1	Year 2	Year 3	Year 4	Year 5
Major event I	40,000	50,000	60,000	70,000	79,000
Major event II	12,000	14,000	16,000	16,000	16,000
Major event III	6,000	8,000	10,000	10,000	10,000
Regional events	1,000	1,200	1,200	1,200	1,200
Club events	200	200	200	200	200

It should be noted that races classified as "Major Event I" have not been held previously on the Lower Mainland due to constraints at the existing facility. Total road racing attendance at the new centre is expected to be much higher than that experienced in the past at Westwood due, primarily, to the staging of these major international competitions.

Average attendance forecasts are described in spectator days. All major events would take place over a two, three or four day period. The levels shown are therefore totals for the entire event.

Although average attendance estimates at some events may appear high to some readers, they are considered by the consulting team to be realistic, and perhaps conservative. For example, Portland International Raceway hosted its first CART race in 1984 and drew 68,500 spectators over a four-day period. Recognizing that the City of Portland represents a smaller market than Vancouver and that both cities are similar distances from the Seattle market, it is expected that a well organized and promoted event of this calibre at the proposed motorsport centre will have little difficulty in attracting the number of spectator-days shown. Furthermore, Westwood Motorsport Park has drawn up to 12,000 spectator-days at events similar to the "Major Event II" category in the past. Since the new road racing course would not have the capacity constraints of the existing facility, attendance levels in the 15,000 to 20,000 range should not be difficult to achieve.

Regional and club events attendance forecasts in Exhibit VI-6 are consistent with actual activity levels for these events at Westwood.

Spectator involvement forecasts for the automobile racing events described above translate to 67,000 spectator-days during the first year of operation increasing to over 206,000 spectator-days once the facility has been in operation for five years. For comparative purposes, Portland International Raceway generated approximately 142,000 spectator-days of activity during its 1983/1984 fiscal year.

4. Motorcycle road racing events will contribute to road course activity

Motorcycle road races will be held on the same track as the automobile road races. A summary of the events likely to be scheduled within this demand segment is provided in Exhibit VI-7.

EXHIBIT VI-7 Motorcycle road racing event schedule

Type of event	Number of events Year 1	Year 2	Year 3	Year 4	Year 5
Major events	2	3	3	3	3
Regional/club events	8	9	10	10	10

The motorcycle road racing events forecasted are similar to those now held at Westwood Motorsport Park. Major events are expected to include one Canadian Motorcycle Association (CMA) national event and one or two CANAM (Canada/U.S. Series) events annually.

Expected attendance at motorcycle road racing events scheduled for the new facility is summarized in Exhibit VI-8.

EXHIBIT VI-8 Motorcycle road racing spectator attendance forecasts

Type of event	Average spectator-days per event Year 1	Year 2	Year 3	Year 4	Year 5
Major events	3,000	3,500	4,000	4,000	4,000
Regional/club events	200	200	200	200	200

Average attendance levels forecasted above reflect recent demand levels at Westwood events and take into account the expected increase in appeal for all events held at the new motorsport centre.

5. Off-road racing events will take time to gain in popularity

A definite demand exists in the Lower Mainland for a proper off-road course. Portland International Raceway has staged events of this nature which have met with considerable success. "Four-by-Four" events held at some locations in the United States attract tens of thousands of spectators.

It is anticipated that major off-road course events will take some time to become popular at the new centre. None are scheduled until its fourth year of operation. Nevertheless, this user segment could prove to be a major activity generator once the motorsport park becomes established.

An event schedule forecast for the off-road course is provided in Exhibit VI-9.

EXHIBIT VI-9 Off-road racing event schedule

Type of event	Number of events Year 1	Year 2	Year 3	Year 4	Year 5
Major events	-	-	-	1	1
Regional/club events	6	8	10	10	10

Attendance at the off-road racing events is expected to be limited relative to other motorsport activity at the proposed centre. These estimates are included in Exhibit VI-10.

EXHIBIT VI-10 Off-road racing spectator attendance forecasts

Type of event	Average spectator-days per event Year 1	Year 2	Year 3	Year 4	Year 5
Major events	N/A	N/A	N/A	2,000	3,000
Regional/club events	200	200	200	200	200

Average attendance level and event forecasts translate into 1,200 spectator-days during the first year of operation and 5,000 spectator-days five years later. These activity levels could be drastically higher in later years or could increase substantially during initial years depending on actual spectator interest on the Lower Mainland.

6. Motocross activity will continue at present levels

Motocross facilities at Mission Raceway are relatively well used. Although increases in activity levels are anticipated at the new motorsport centre, they are not expected to be dramatic.

Exhibit VI-11 summarizes the number of motocross events expected to be organized during the first five years that the centre is in operation.

EXHIBIT VI-11 Motocross event schedule

	Number of events				
Type of event	Year 1	Year 2	Year 3	Year 4	Year 5
Major events	-	-	1	1	1
Regional/club events	6	7	8	8	8

Average attendance at motocross events is also expected to be relatively low when compared with other motorsport facilities planned. Nevertheless, motocross is a popular pursuit on the Lower Mainland and both the number of competitors and the number of spectators at events could increase dramatically once the new motorsport centre becomes operational.

Exhibit VI-12 provides attendance forecasts for specific types of motocross events used in this study.

EXHIBIT VI-12 Motocross spectator attendance forecasts

	Average spectator-days per event				
Type of event	Year 1	Year 2	Year 3	Year 4	Year 5
Major events	N/A	N/A	1,000	1,500	2,000
Regional/club events	100	150	200	200	200

Regional and club attendance forecasts are consistent with activity levels recently experienced at Mission Raceway. Major event forecasts represent conservative estimates of participation when compared with major motocross events held elsewhere.

7. Go-kart racing offers potential for expansion

Go-kart racing will take place on both the road race course and the go-kart track at the new motorsport centre. Major events held on the road course have considerable potential to draw large crowds. A schedule of go-kart racing events likely to be held at the new centre is summarized in Exhibit VI-13.

EXHIBIT VI-13 Go-kart racing event schedule

Type of event	Number of events Year 1	Year 2	Year 3	Year 4	Year 5
Major events	2	3	3	3	3
Regional/club events	9	10	10	10	10

Average projected attendance for each type of go-kart racing event is summarized in Exhibit VI-14.

EXHIBIT VI-14 Go-kart racing spectator attendance forecasts

Type of event	Average spectator-days per event Year 1	Year 2	Year 3	Year 4	Year 5
Major events	1,000	1,000	1,500	1,500	2,000
Regional/club events	500	500	500	500	500

Attendance forecasts are consistent with activity levels currently experienced at the various types of events held at Westwood Motorsport Park.

As such they are considered to be conservative. The spectator appeal of go-kart racing at the new complex can be better defined once it becomes operational.

C. MANY NON-MOTORSPORT ORGANIZATIONS WILL LIKELY MAKE USE OF THE FACILITIES DEVELOPED

Previous work[1] undertaken clearly identified that a variety of companies, organizations and government agencies are interested in the proposed motorsport centre due to the potential use each could make of the facilities planned. This non-motorsport use is inevitable since it now takes place at existing motorsport facilities as well as at other motorsport centres throughout North America. Not only would such a centre provide needed facilities for these groups, and therefore become a valuable asset in the Province, but it would also enable the complex to generate additional revenue from facility rental when facilities are not being used for motorsport purposes.

The "Lower Mainland Motorsport Centre -- Preliminary Assessment" report included the following conclusions.

> Non-motorsport type use of the proposed centre is expected to be a significant contributor to the overall viability of the project. Not only can many of these activities be programmed during the non-peak periods, but many can also be carried out on a year-round basis.
>
> Several types of non-motorsport use of the facilities which are likely to occur, should this project be implemented, are as follows:
>
> - Police and emergency vehicle driven training.
> - High speed driver training and testing.
> - Off-road safety training.
> - Vehicle performance and economy testing.
> - Truck/semi-trailer driver training.
> - Heavy equipment operator training.
> - Ultralight aircraft operations.

---

[1] "Lower Mainland Motorsport Centre - Preliminary Assessment" — Novacorp Consulting Inc. - November 1983.

- Music festivals/concerts.
- Television commercial and movie filming.
- Rental garage areas.
- Light industry operations.
- Development of prototype automobiles.
- New product experimentation.
- Boat or vehicle storage.
- BMX activities.
- Soap box racing.
- Cycling activities and events.
- Meeting and assemblies.
- Commercial camping and R.V. facility rental.
- Tourism attractions (e.g. museum, antique car display, water slide, miniature golf, etc.)"

The above list is by no means exhaustive. The size of the area required for a motorsport centre provides ample opportunity to develop facilities and areas for a variety of other uses. Most, if not all, non-motorsport activities for which the site can and will be used should be required to pay for this use. This category of user will provide a substantial level of revenue to the motorsport centre. Those organizations or companies which expect to make constant and ongoing use of the site may contribute to the overall capital costs of the project.

1. Realistic levels of non-motorsport use have been used in this study

The potential for non-motorsport use of the motorsport centre is considerable, as evidenced from the above opportunity list. Most of these potential users, however, will discuss possible utilization and/or involvement with the operator of the motorsport centre once it is being developed or once it becomes operational.

For purposes of this study, some basic assumptions have been made concerning non-motorsport use of the proposed centre. These assumptions are based on conversations held with potential users as well as on non-motorsport use of existing facilities on the Lower Mainland and elsewhere in North America.

Non-motorsport utilization has been estimated on the basis of facility rental days annually under various rental categories as described in Exhibit VI-15.

EXHIBIT VI-15 Non-motorsport utilization forecasts

Type of facility	Rental days annually				
	Year 1	Year 2	Year 3	Year 4	Year 5
Major facility (e.g. road course, oval track)	40	50	60	70	70
Major land area (e.g. concerts)	4	4	4	4	4
Minor facility (e.g. parking, storage)	60	60	60	60	60
Minor land area (e.g. meetings)	20	30	40	40	40

Non-motorsport utilization forecasts described in Exhibit VI-15 are considered reasonable in light of similar demand elsewhere and facilities planned at the motorsport centre. They are used in Chapter VII of this report to generate revenue from non-motorsport use. It should be recognized that non-motorsport utilization and revenue calculations are affected to the greatest extent by rental of major facilities and major land areas. Minor facility and land area rentals are, at this level of analysis, effectively inconsequential.

D. OVERALL MOTORSPORT CENTRE UTILIZATION WILL BE SIGNIFICANT

Forecasts of motorsport centre utilization included all types of motorsport activity as well as non-motorsport involvement in the complex. An understanding of the overall extent to which the centre will be used is provided in Exhibit VI-16 which combines various types of use and measures facility-days of use relative to 365 days of motorsport centre availability annually.

EXHIBIT VI-16 Projected motorsport centre utilization

Type of utilization[1]	Facility days of utilization				
	Year 1	Year 2	Year 3	Year 4	Year 5
Drag racing	9	14	18	21	22
Oval track racing	13	16	18	18	18
Automobile road racing	26	32	42	42	42
Motorcycle road racing	12	15	16	16	16
Off-road racing	6	8	10	12	12
Motocross	6	7	10	10	10
Go-kart racing	13	16	16	16	16
Total motorsport	85	108	130	135	136
Non-motorsport[2]	44	54	64	74	74
Total utilization	129	162	194	209	210
Utilization factor[3]	35.3%	44.4%	53.2%	57.3%	57.5%

When interpreting Exhibit VI-16 it is important to note that motorsport utilization will be weekend oriented and that events at the major facilities will overlap. It is also noteworthy that this utilization table excludes non-competitive use of the motorsport centre for such motorsport club purposes as swap meets, car shows, picnics and other socially oriented activities.

Exhibit VI-16 does illustrate that a total of 85 motorsport event-days will likely be scheduled during the first year of operation and that this can be expected to increase to 136 motorsport event-days during the fifth year of operation. This combines both major and minor events of all kinds. Once relatively conservative estimates of major facility and area rental to non-motorsport users are included, effective utilization of the centre increases to 35 per cent in year one and to close to 58 per cent in year five. Again, this is not necessarily a measure of the number of days the centre will experience significant use but, rather, the facility-days of use. While heaviest utilization will occur during the weekends from March through October, non-motorsport users are expected to rent facilities primarily during the off-peak period for motorsport activity.

---

[1] Major events for all categories assumed to cover 2 days except auto road racing which is assumed to cover 3 days. All other events are assumed to be one day in length.

[2] Major facility and major area rental only.

[3] Facility days of utilization annually ÷ 365

E. THE BASE FORECASTS ARE MEASURED IN SPECTATOR-DAYS

Forecasts of motorsport activity described above have focussed on levels of spectator attendance for the following reasons:

- Spectator attendance generally reflects the intensity of motorsport activity at any given event;
- Total spectator attendance takes into account both the number of events held and the appeal of each event;
- Competitive participant involvement does not exactly parallel spectator attendance but participant expenditure levels are expected to approximately parallel attendance due to higher outlays on vehicles, parts and supplies for events with greater appeal;
- Base utilization measurement of spectator attendance at past events is generally more consistent and more reliable than competitive participant involvement; and
- Spectators are expected to represent a principal revenue source for the motorsport centre and an important contributor to the local economy.

Using spectator attendance as the principal parameter by which Lower Mainland motorsport activity is measured, specific growth rates can be determined by the type of motorsport concerned. The following attendance estimates were developed during this study to serve as the 1984 base year for forecasting:

- Drag Racing -- Sand drag activity only at Mission Raceway in 1984 with estimated total attendance of 2,000 spectator-days.
- Oval Track Racing -- Events held at Action Raceway in 1984 with estimated total attendance of 18,000 spectator-days.
- Automobile Road Racing -- Events held at Westwood Motorsport Park in 1984 with estimated total attendance of 24,000 spectator-days.
- Motorcycle Road Racing -- Events held at Westwood Motorsport Park in 1984 with estimated total attendance of 14,000 spectator-days.
- Off-road Racing -- No organized events held in the Lower Mainland for which attendance was available in 1984 and therefore an attendance estimate of zero was used.

- Motocross -- Events held at Mission Raceway in 1984 with estimated total attendance of 1,000 spectator-days.
- Go-kart Racing -- Events held at Westwood Motorsport Park in 1984 with estimated total attendance of 8,000 spectator-days.

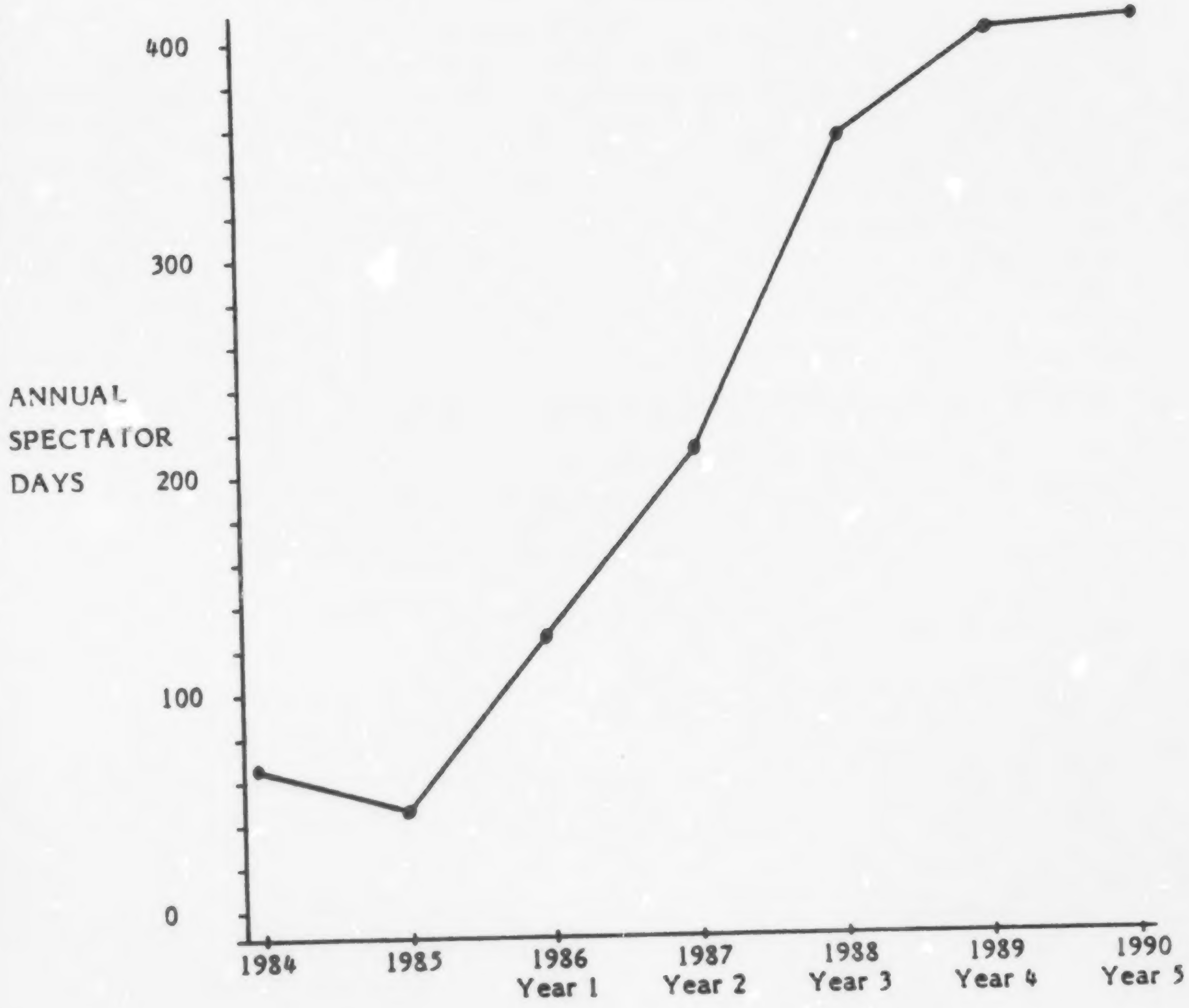
This summary produces a 1984 base activity level for the motorsport facilities and events of primary concern in this study of 67,000 spectator-days.

Making use of this base activity level and the motorsport utilization forecasts described above, growth rates which are expected to be associated with development of a new motorsport centre can be determined. They are represented in Exhibit VI-17 on the assumption that the motorsport centre becomes operational for the 1986 racing season.

The decline shown between 1984 and 1985 accounts for the recently announced decision by the G.V.R.D. not to renew Action Raceway's lease for the 1985 season. It has been assumed for this analysis, therefore, that oval track racing will cease to exist until the new motorsport centre is opened in 1986.

Between 1985 and 1990, the average annual compounded growth rate of motorsport activity represented by the graph in Exhibit VI-17 is about 53% per annum.

EXHIBIT VI-17 Lower Mainland motorsport activity forecasts



VII

FINANCIAL CHARACTERISTICS OF THE CENTRE

The expected financial performance of the proposed motorsport centre is summarized in this chapter. Since this study focused on market and economic analysis of the complex, we made some use of previous work[1] undertaken to assist in the projection of financial characteristics. This work was used, for example, as a source of information for capital and operating costs. Based on our research, however, we have prepared new operating assumptions for the motorsport centre as discussed earlier and developed new revenue forecasts based on our analysis of market potential and rate structures.

A. CAPITAL DEVELOPMENT COSTS ARE SIGNIFICANT

Capital cost estimates for the proposed motorsport centre were developed during the "Lower Mainland Motorsport Centre -- Preliminary Assessment" study. These costs reflect the investment necessary to complete the project with the scope and to the level of quality described earlier in this report.

Capital costs were prepared based on a number of important assumptions as outlined below:

- For purposes of determining initial levels of capital cost, it was assumed that all contracts would be placed out to open, competitive tendering. Furthermore, full market prices were used for labour, material and equipment. To the extent that "non-market" arrangements can be made to lower overall costs on specific components of the project, total capital expenditure requirements will be reduced accordingly.
- Capital cost estimates were developed on the basis that all moveable and semi-permanent fixtures and equipment would be purchased new at full market prices. To the extent that equipment and fixtures at existing facilities can be utilized, total capital expenditure requirements will be reduced accordingly.

---

[1] "Lower Mainland Motorsport Centre -- Preliminary Assessment" -- Novacorp Consulting Inc., November 1983.

- Capital cost estimates have been developed on the basis of 1983 wage, price and cost levels. It has been assumed that all materials and labour will be sourced locally, to the extent practical.

Although costs estimated reflect 1983 levels, there is no reason to expect that costs for 1985 should change significantly from those estimated about 1 1/2 years ago.

The actual development costs for the motorsport centre will depend on the site selected as well as a number of other factors. Three site development alternatives were costed during the previous work mentioned above. A summary of the capital cost estimates in each case is included in Exhibit VII-1.

EXHIBIT VII-1 Motorsport Centre -- Capital cost summary

	Alternatives		
Cost category	1	2	3
Site preparation & construction	$ 9,129,000	$10,112,000	$ 8,478,000
Utilities & equipment	230,000	230,000	230,000
Planning, design & management	1,510,000	1,648,000	1,418,000
Total Development Cost	$10,869,000	$11,990,000	$10,126,000

It is important to note that the above cost estimates exclude land acquisition as well as "soft" development costs connected with the motorsport centre such as legal fees, interest costs during construction and costs associated with long-term financing.

The three alternatives identified above represented hypothetical development scenarios on a hypothetical site. The costs are, therefore, representative of those which would be incurred. For purposes of this report a total capital cost estimate of $11 million is used for the proposed motorsport centre, excluding land acquisition.

B. MOTORSPORT CENTRE OPERATIONS WILL GENERATE SUBSTANTIAL REVENUE

It is expected that substantial levels of revenue will be generated by the proposed motorsport centre, primarily by major events and the attendance generated. The following paragraphs describe revenue generation expected, based on forecasts of activity and assumed involvement of the centre in event organization and promotion.

1. Rate structures will be competitive and increase over time

The new motorsport centre must price itself in a manner which will enable small user groups to afford to use the facilities, which will attract large crowds to major events and which will generate revenue for the centre to cover operating and some capital costs. Taking these factors into account, a gate charge profile for the complex was developed based on the type of event staged, prices charged at similar facilities elsewhere and the increasing reputation of the centre over time. This profile is summarized in Exhibit VII-2.

Gate charges shown take into account the length of each type of event and the varying prices expected depending on the day of attendance. All rates are based on 1985 levels including increased charges expected in later years as events become more popular. Inflationary increases have not been taken into account.

The motorsport centre is also expected to generate a significant amount of revenue from rental of facilities and areas for non-motorsport use. Daily rental rates expected to be charged for this type of utilization have been estimated for major rental revenue categories as follows:

►	Major facility rental	- $ 800 per day
►	Major land area rental	- $1,000 per day

It should be recognized that these rental rates would be charged for commercially oriented use of facilities and land areas. They represent an average of what can likely be achieved since some types of non-motorsport use would likely be willing to pay substantially more than other types. Furthermore, in specific cases such as area rental for concerts, it is expected that management of the centre would conclude arrangements involving a percentage of the gross revenue of the event involved and therefore generate effective rental rates well in excess of those shown.

EXHIBIT VII-2 Motorsport centre event spectator structure forecast — (1985 dollars)

	Average gate charge per spectator day				
Type of event	Year 1	Year 2	Year 3	Year 4	Year 5
Drag Racing					
Major event I		15	16	18	18
Major event II	8	10	12	12	12
Regional/club events I	4	6	6	6	6
Regional/club events II	4	5	5	5	5
Oval Racing					
Major event I	8	10	10	10	10
Major event II	6	8	8	8	8
Regional/club events	5	5	5	5	5
Automobile Road Racing					
Major event I	10	12	14	14	14
Major event II	8	10	12	12	12
Major event III	6	8	10	10	10
Regional events	5	6	6	6	6
Club events	4	5	5	5	5
Motorcycle Road Racing					
Major event	5	6	7	7	7
Regional/club events	3	4	4	4	4
Off-Road Racing					
Major event	-	-	-	10	10
Regional/club events	3	4	4	4	4
Motocross					
Major event	-	-	10	10	10
Regional/club events	4	5	6	6	6
Go-Kart Racing					
Major event	6	8	8	8	8
Regional/club events	3	4	4	4	4

2. Overall revenue generation potential will be enormous

Based on the rate structure described above and attendance forecasts detailed in Chapter VI, overall revenue characteristics of the proposed motorsport centre were developed. Exhibit VII-3 summarizes these characteristics by source (i.e. type of event or rental) and by year for each of the first five years of operation.

Total revenue generating potential of the motorsport centre is expected to increase from $940,000 during the first year of operation to well over $4 million during the fifth year of operation, an annually compounded growth rate of 47.5% per year. These estimates exclude revenue generated as a result of concession operations at the events held.

3. Only a portion of the revenue will accrue to the centre

As we discussed in Chapter III, it is expected that motorsport centre management will become involved in event organization and promotion to differing degrees based on the type and scope of events staged. This varying involvement will ensure that events are successfully staged and that risk levels faced are acceptable. It will, however, result in less revenue accruing to the centre itself as promoting and organizing groups receive their own share of the gross receipts.

For purposes of this study, it has been assumed that the revenue accrual characteristics described in Exhibit VII-4 are achieved by the motorsport centre.

These revenue accrual characteristics and the corresponding operating arrangements for management of motorsport centre facilities will ensure that the time and effort expended will generate positive financial results for the complex.

Application of revenue accrual expectations described above to forecasted levels of motorsport centre activity result in the motorsport centre revenue characteristics summarized in Exhibit VII-5. Exhibit VII-5 represents realistic revenue levels likely to be achieved by the motorsport centre, excluding concession revenue, taking into account the gate receipt percentages expected to accrue to professional promoting organizations. Revenue levels are still expected to be significant, increasing from about $320,000 to close to $1.4 million after five years of operation.

EXHIBIT VII-3 Motorsport Centre gate receipt revenue by event — (1985 dollars x 1,000)

	Gross revenue from gate receipts				
Type of event	Year 1	Year 2	Year 3	Year 4	Year 5
Drag Racing					
Major event I	-	300	400	540	540
Major event II	40	80	240	240	240
Regional/club event I	16	60	72	108	144
Regional club event II	24	80	150	180	180
Oval Racing					
Major event I	48	80	100	120	120
Major event II	24	80	96	96	96
Regional club events	90	125	180	180	180
Auto Road Racing					
Major event I	400	600	1,680	1,960	1,960
Major event II	96	280	384	384	384
Regional events	35	58	72	72	72
Club events	8	12	14	14	14
Motorcycle Road Racing					
Major events	30	63	84	84	84
Regional/club events	5	7	8	8	8
Off-Road Racing					
Major events	-	-	-	20	20
Regional/club events	4	6	8	8	8
Motocross					
Major events	-	-	10	15	20
Regional/club events	2	5	10	10	10
Go-Kart Racing					
Major events	12	24	36	36	48
Regional/club events	14	20	20	20	20
Gross gate receipts	$ 884	$1,944	$3,764	$4,295	$4,348
Facility/area rental	56	64	72	80	80
Gross revenue	$ 940	$2,008	$3,836	$4,375	$4,428

EXHIBIT VII-4 Motorsport centre — revenue accrual characteristics

Type of event	Revenue accrual characteristics
Drag Racing	
- Major events	- 15% of gross gate receipts
- Regional/club events	- 100% of gross gate receipts
Oval Track Racing	
- Major events	- 85% of gross gate receipts
- Regional/club events	- Track rental @ $400/day
Road Racing	
- Major events	- 15% of gross gate receipts
- Regional/national events	- 90% of gross gate receipts
- Club events	- Track rental @ $300/day
Off-Road Racing	
- All events	- Facility rental @ $300/day
Motocross	
- All events	- Facility rental @ $200/day
Go-Kart Racing	
- All events	- Track rental @ $200/day

EXHIBIT VII-5 **Actual Motorsport Centre Revenue — (1985 dollars x 1,000)**

Type of event	Revenue accruing to the motorsport centre				
	Year 1	Year 2	Year 3	Year 4	Year 5
Drag Racing					
Major event I	-	45	60	81	81
Major event II	6	12	36	36	36
Regional/club event I	16	60	72	108	144
Regional/club event II	24	80	150	180	180
Oval Track Racing					
Major event I	41	68	85	102	102
Major event II	20	68	82	82	82
Regional/club events	4	4	5	5	5
Automobile Road Racing					
Major event I	60	90	252	294	294
Major event II	14	42	58	58	58
Major event III	32	58	180	180	180
Regional events	32	52	65	65	65
Club events	3	4	4	4	4
Motorcycle Road Racing					
Major events	5	9	13	13	13
Regional/club events	2	3	3	3	3
Off-Road Racing					
All events	2	2	3	3	3
Motocross					
All events	1	1	2	2	2
Go-Kart Racing					
All events	2	3	3	3	3
Facility/area rental	56	64	72	80	80
Total motorsport centre revenue	$ 320	$ 665	$1,145	$1,299	$1,335

VIII

ECONOMIC BENEFITS OF THE MOTORSPORT CENTRE

The future economic implications of motorsport centre development will represent a key consideration to those deciding on the nature and the extent of support to be provided. This section of the report combines base economic benefit levels attributed to competitive motorsport with corresponding motorsport activity forecasts prepared for the proposed motorsport centre.

A. SIGNIFICANT NEW EMPLOYMENT OPPORTUNITIES WILL BE CREATED

The level of activity expected at the new motorsport centre will generate new jobs in four principal ways:

- Ongoing employment at the motorsport centre.
- Short-term employment at the motorsport centre during major events.
- Off-site employment with automotive and motorcycle oriented companies due to additional business volume from motorsport facility development.
- Off-site employment at accommodation, food and beverage establishments which serve motorsport visitors and participants.

1. Creation of new jobs at the motorsport centre will be noticeable

Ongoing full-time and part-time employment at the proposed motorsport centre is not expected to be high but will be noticeable. A number of ongoing jobs will be created and, during major events, a variety of short-term employment opportunities will be created.

Exhibit VIII-1 summarizes the extent of temporary employment expected at the new motorsport centre during a race-day or on race-weekends. These estimates of event employment were developed using a profile of hired workers per event, the length of the event and the type of event. The extent to which volunteers become involved in these activities now and the extent to which they will continue to become involved in the future was taken into account. While profiles of paid workers at each event vary bv type of event, the profile in Exhibit VIII-2 may be considered typical.

EXHIBIT VIII-1 Employment generated at the centre from motorsport activities

Type of event	Man-years per event factor	Man-years of employment				
		Year 1	Year 2	Year 3	Year 4	Year 5
Drag racing						
- Major events	0.7	0.7	1.4	2.1	2.1	2.1
- Reg'l/club events	0.1	0.7	1.0	1.2	1.5	1.6
Oval racing						
- Major events	0.5	1.0	1.5	1.5	1.5	1.5
- Reg'l/club events	0.2	1.8	2.0	2.4	2.4	2.4
Automobile road racing						
- Major events	0.9	2.7	3.6	5.4	5.4	5.4
- Reg'l/club events	0.1	1.7	2.0	2.4	2.4	2.4
Motorcycle road racing						
- Major events	0.5	1.0	1.5	1.5	1.5	1.5
- Reg'l/club events	0.1	0.8	0.9	1.0	1.0	1.0
Off-road racing						
- Major events	0.4	--	--	--	0.4	0.4
- Reg'l/club events	0.1	0.6	0.8	1.0	1.0	1.0
Motocross						
- Major events	0.4	--	--	0.4	0.4	0.4
- Reg'l/club events	0.1	0.6	0.7	0.8	0.8	0.8
Go-kart racing						
- Major events	0.5	1.0	1.5	1.5	1.5	1.5
- Reg'l/club events	0.1	0.9	1.0	1.0	1.0	1.0
TOTAL EMPLOYMENT (Non-voluntary)	N/A	13.5	17.9	22.2	22.9	23.0

EXHIBIT VIII-2 Profile of workers at typical competitive event

	No. actually employed (no. of days employed)			
	Regional/club event		Major event	
Concessions	2	(1.5 days)[1]	40	(2 days)
Ambulance/paramedics	3	(1.5 days)	8	(2 days)
Tow truck operators	6	(1.5 days)	12	(2 days)
Security	3	(1.5 days)	30	(2 days)
Gate	1	(1.5 days)[1]	10	(2 days)
Agency pre-sales of tickets	Nil		2	man-days
P.R./printing/advertising	Nil		6	man-days
Communications	2	man-day	3	man-days
Announcer	1	(1.5 days)	3	man-days
Media coverage	Nil		10	man-days
Miscellaneous	2	man-days	10	man-days
TOTAL MAN-DAYS/EVENT	27		235	
TOTAL MAN-YEARS/EVENT[2]	0.108		0.936	

[1] Most are volunteer workers

[2] Man-year equivalent = man-days ÷ 250

Employment profiles were estimated for each type of event and therefore vary from that shown above which typifies automobile road racing events. Man-year factors vary among types of events as shown on Exhibit VIII-1 due to the size of events and the extent to which volunteers are made use of. It is evident, however, that between 13 and 23 full-time job equivalents are expected to be created each year at competitive events held at the motorsport centre. Many volunteer jobs are also anticipated, especially at smaller regional and club events.

A number of ongoing jobs will also be created at the motorsport centre due to ongoing management, promotion, administrative and maintenance requirements. The estimated level of employment so represented is summarized on a yearly basis in Exhibit VIII-3.

EXHIBIT VIII-3 Ongoing employment at the motorsport centre

Position[1]	Year 1	Year 2	Year 3	Year 4	Year 5
General manager	1.0	1.0	1.0	1.0	1.0
Secretary/bookkeeper	1.0	1.0	1.0	1.0	1.0
Public relations/promotion	--	0.5	0.5	0.5	1.0
Maintenance - full-time	1.0	1.0	1.0	1.0	1.0
- contracted	0.3	0.4	0.5	0.5	0.5
Oval track op'ns/mgmt.	0.5	0.5	0.5	0.5	0.5
Road course op'ns/mgmt.	0.5	0.6	0.7	0.8	0.9
Drag strip op'ns/mgmt.	0.4	0.5	0.5	0.6	0.6
TOTAL MAN-YEAR EQUIVALENT	4.7	5.5	5.7	5.9	6.5

[1] Positions represent preliminary assumptions and do not necessarily reflect the eventual organizational structure of the proposed motorsport centre. They do take into account employment characteristics of similar facilities such as Portland International Raceway.

The above ongoing employment projections are representative of the level of job creation anticipated for the motorsport centre. They are, however, based on preliminary organizational structure, responsibility and operational assumptions which do not, necessarily, reflect the optimal organizational arrangements for the proposed motorsport centre. These organizational arrangements need to be evaluated in some detail before they are finalized.

In summary, the motorsport centre itself can be expected to generate, directly, the equivalent of 18 man-years of employment during the first year of operation increasing to close to 30 man-years of employment annually in the fifth year as shown in Exhibit VIII-4.

2. Major employment opportunities will be created in the automotive and motorcycle business sectors

Economic characteristics of the motorsport industry were described in Chapter V. The results of this rigorous analysis indicated clearly that close to 900 jobs in the Lower Mainland are currently supported by revenue generated by competitive motorsport activity, primarily in automotive and motorcycle related companies. The calculation of this estimate was detailed earlier in Exhibit V-6.

EXHIBIT VIII-4 Direct employment generated by the motorsport centre

	Equivalent man-years of employment				
	Year 1	Year 2	Year 3	Year 4	Year 5
Race day employment	13.5	17.9	22.2	22.9	23.0
Ongoing centre employment	4.7	5.5	5.7	5.9	6.5
DIRECT CENTRE EMPLOYMENT	18.2	23.4	27.9	28.8	29.5

An analysis of new job creation within these two sectors resulting from motorsport centre development was carried out. The analysis resulted in projections of net job creation relative to base employment levels measured during 1984. It was assumed that the proposed motorsport centre would be constructed and become operational for the 1986 racing season for this evaluation.

Motorsport activity, for purposes of this study, was measured and projected in terms of spectator-days. The same parameter was used to project employment generation within the automotive and motorcycle industrial sectors as a result of motorsport centre development. Job creation expected, however, will not vary directly with motorsport activity increases. Projections of employment generation within these sectors were based on the following considerations:

- ▶ Overall competitive motorsport participant activity growth will be lower than total expected spectator-day increases at the new motorsport centre.

- ▶ Participant activity level increases will be primarily responsible for job creation in the automotive and motorcycle business sectors.

- ▶ As competitive motorsport activity revenue levels accrue to companies within these sectors, a portion of revenue which supports wages will reinforce the stability of existing jobs while the balance will directly support new jobs.

Making use of base (1984) levels of employment supported by competitive motorsport activity expenditures, new job creation in the automotive and motorcycle business sectors was projected taking into account increased activity at the new motorsport centre in addition to the above considerations. This was carried out for a variety of business categories (as indentified in Exhibit VIII-5) within these sectors for each of the first five years of operation at the proposed motorsport centre.

Exhibit VIII-5 summarizes net job creation within each business category for the automotive and motorcycle sectors. New employment generated in each year is projected, relative to that which is supported by competitive motorsport expenditures in the base year (1984). The "Employment Increase Factor" shown for each category represents the result of our analysis of the proportion of new wage supporting revenue which is actually expected to generate new jobs. This factor is higher for some categories (e.g. "manufacturing" and "automobile servicing-high performance") where firms are relatively small and competitive motorsport revenue is expected to have a more substantial impact on job creation than for other categories (e.g. "automobile servicing-general performance" and "automobile parts distributors").

The employment projections detailed in Exhibit VIII-5 represent a realistic forecast of increased job activity in the sectors described due to increased competitive motorsport activity in the Lower Mainland. Businesses which now support a large number of jobs with motorsport revenue (e.g. "auto parts distributors" and "motorcycle sales, parts & service") are expected to account for most of the new jobs created as their business volume increases. Those companies, however, which are small but which now rely quite substantially on competitive motorsport revenue (e.g. "manufacturing" and "auto servicing-high performance") will become increasingly important within the overall job creation profile. For example, manufacturing now accounts for less than 5% of competitive motorsport supported jobs. This proportion is expected to increase to close to 8% once the motorsport centre has been operating for five years.

In summary, a total of some 970 new man-years of employment is expected to be generated annually due to motorsport centre development once the complex has been operating for five years. A total of over 270 full-time and part-time new jobs will be created in 1986 if the centre becomes operational that year. This compares to approximately 900 jobs in the Lower Mainland now supported by competitive motorsport activity as described in Chapter V.

EXHIBIT VIII-5 Employment generated in the automotive and motorcycle sectors

Business category	Employment increase factor	Year					
		1	2	3	4	5	Cumm.
. Manufacturing	0.6	24	27	37	9	4	101
. Automobile dealers	0.3	22	20	23	5	2	72
. Auto parts distributor	0.3	43	40	46	10	3	142
. Auto parts suppliers	0.4	32	31	38	9	3	113
. Auto servicing-high performance	0.8	15	19	28	8	3	73
. Auto servicing-general performance	0.2	62	52	57	11	4	186
. Tires	0.3	14	13	15	3	1	46
. Motorcycle sales, parts & service	0.5	51	53	68	16	6	194
. Automobile painting	0.3	1	1	-	-	-	2
. Auto electrical services	0.3	-	-	-	1	-	1
. Auto seat covers, tops & upholstery	0.3	-	-	-	1	-	1
. Auto restoration & customizing	0.3	2	2	-	1	1	6
. Auto wheel alignment, axle & frame repair	0.3	2	2	-	1	-	5
. Auto body repair, body equip. & supplies	0.3	2	2	-	1	-	5
. Automobile wrecking	0.4	7	6	8	2	1	24
TOTAL NEW JOBS/YEAR	N/A	277	268	320	78	28	971
CUMULATIVE NEW JOBS	N/A	277	545	865	943	971	

3. Tourism related employment due to motorsport is expected to increase by well over 400% over five years

Current expenditure levels by visitors to the Lower Mainland on motorsport events are small in a relative sense. As described in Chapter V, they now account for a total employment level of about six man-years annually.

Substantial increases in spectator and participant activity by non-Lower Mainland residents is expected to occur once the motorsport centre becomes operational for the following reasons:

- Many events will be national and international in scope, have widespread appeal and attract large numbers of spectators and visitors from the United States and Western Canada.
- Numerous major events will be held at the new motorsport centre which are infrequently held at other west coast motorsport facilities and will therefore appeal strongly to the Seattle market.
- New facilities will enable ongoing cross-border, inter-provincial and intra-provincial competitive series and rivalries to be established which will attract both competitors and spectators from outside of the Lower Mainland. This was evidenced from all of the research undertaken and from discussions with race track officials.

Overall estimates of out-of-town attendance at motorsport events held at the new centre are summarized in Exhibit VIII-6.

Estimates of out-of-town visitors by event in Exhibit VIII-6 are based on the estimated proportion realized at Lower Mainland facilities in the past and experience at other North American facilities. They take into account the mix of events within each category, the greater appeal to visitors of major events relative to club and regional events, and the potential appeal of major events to the Seattle, Alberta, Vancouver Island and B.C. Interior markets.

The proportions described above have been combined with spectator-day forecasts to determine visitor activity resulting from motorsport events held at the new centre. The results of this expansion are summarized in Exhibit VIII-7.

EXHIBIT VIII-6 Estimated proportion of out-of-town visitors by event

Type of event	Visitor proportion of total spectator-days 1984	Year 1	Year 2	Year 3	Year 4	Year 5
. Drag racing	10%	10%	12%	14%	16%	18%
. Oval track racing	10%	10%	10%	12%	12%	12%
. Automobile road racing	20%	24%	25%	26%	26%	26%
. Motorcycle road racing	20%	22%	22%	24%	25%	25%
. Off-road racing	N/A	5%	10%	10%	10%	10%
. Motocross	5%	6%	6%	7%	8%	8%
. Go-kart racing	5%	6%	7%	8%	8%	8%

It is evident from Exhibit VIII-7 that visitor attendance at motorsport events is expected to increase significantly once the new centre becomes operational. Over 21% of total spectator-days (i.e. over 90,000) are expected to be accounted for by visitors from outside the Lower Mainland once the new complex has been operating for five years. About 75% to 80% of this total is expected to be accounted for by United States residents.

Visitor expenditures made in the Lower Mainland area during motorsport events will result directly in economic benefits to Lower Mainland businesses. The level of this expenditure will depend on the type of accommodation and related services desired and which are available. An approximate breakdown of the type of visitor expenditures expectd in the Vancouver area is as follows:

- ▶ Accommodation -- 24%
- ▶ Meals -- 29%

EXHIBIT VIII-7 Visitor activity at motorsport events

	Visitor-day involvement					
	1984	Year 1	Year 2	Year 3	Year 4	Year 5
. Drag racing[1]	200	1,500	6,500	8,400	16,600	19,800
. Oval track racing	1,800	3,300	4,300	7,000	7,200	7,200
. Automobile road racing	2,400	16,100	24,500	48,600	53,800	58,400
. Motorcycle road racing	2,400	1,700	2,700	3,400	3,500	3,500
. Off-road[2] racing	-	100	200	200	400	500
. Motocross[3]	50	50	60	180	250	300
. Go-kart racing	400	400	600	800	800	800
TOTAL	9,650	23,150	38,860	68,580	82,550	90,500
PROPORTION OF TOTAL SPECTATOR-DAYS	14.4%	17.8%	17.8%	19.1%	20.6%	21.7%

[1] Only sand drag events were held at Mission Raceway during 1984 accounting for the low level of visitor appeal.

[2] No off-road races were held at established Lower Mainland facilities during 1984.

[3] Existing motocross events and those to be held during the early years at the motorsport centre are expected to be club and regional events with correspondingly limited visitor appeal.

- Recreation -- 7%
- Shopping -- 14%
- Other -- 26%

It should be noted that only those visitor expenditures which accrue during motorsport event weekends are accounted for in this study. Many visitors will stay in the Lower Mainland for a period of time before or after the event itself and generate additional revenue in the local economy.

To determine the actual employment generated as a result of visitor expenditures, it was necessary to estimate daily expenditures by these visitors external to the actual events themselves. Motorsport centre employment generated by all spectators and participants was estimated separately and described earlier in this chapter.

Exhibit VIII-8 provides estimates of average non-event expenditure levels per day for these visitors. They take into account that some will remain overnight while others will travel to the event for one day only. Based on visitor day estimates, expenditures are totaled in Exhibit VIII-8 to provide total direct income to the Lower Mainland economy from non-event visitor expenditures. That proportion of this income which supports wages and salaries is estimated and the total number of full-time job equivalents supported by the expenditures is detailed in Exhibit VIII-9.

It is important to note that these expenditure projections apply to visitors, only during the time each is in the Lower Mainland area to attend motorsport events. Some visitors will stay over for a period beyond the event itself and those additional expenditures are not taken into account in this analysis. All projections are made at 1984 dollar levels. In addition, it is noticeable that average daily expenditures by visitors are expected to increase over time, in real terms, as events become more popular and appeal to a wider cross section of people in the markets outside the Lower Mainland.

The increase in average visitor expenditures is accounted for by the relatively limited international appeal of motorsport events now staged on the Lower Mainland. Once the highest calibre events take place, the proportion of visitors attending the events who make use of local hotels, motels, restaurants and the like will increase. Corresponding levels of expenditures by these tourists are also, therfore, expected to increase.

EXHIBIT VIII-8 Average expenditures by motorsport event visitors[1]

Type of event	Average expenditure per person per day[1] (1984 $)					
	1984	Year 1	Year 2	Year 3	Year 4	Year 5
Drag racing		$ 40	$ 42	$ 44	$ 45	$ 46
Oval track racing		40	42	43	44	45
Automobile road racing		55	60	65	70	75
Motorcycle road racing		45	50	55	60	63
Off-road racing		40	41	42	42	42
Motocross		40	41	42	42	42
Go-kart racing		45	48	50	52	52
AVERAGE (NOT WEIGHTED)	$23.60[2]	$43.57[3]	$46.29	$48.71	$50.71	$52.14

---

[1] Excluding event expenditures such as gate charges, concession purchases, etc.

[2] Calculations on the basis of earlier studies commissioned by Tourism B.C.

[3] Estimated on the basis of research undertaken and average expenditures information for visitors to U.S. events.

EXHIBIT VIII-9 Employment generation by motorsport event visitors[1]

Type of event	Total visitor expenditures[1] (1984 $ x 1,000)				
	Year 1	Year 2	Year 3	Year 4	Year 5
Drag racing	$ 60	$ 273	$ 370	$ 747	$ 911
Oval track racing	132	181	301	317	324
Automobile road racing	886	1,470	3,159	3,766	4,380
Motorcycle road racing	77	135	187	210	441
Off-road racing	4	8	8	17	21
Motocross	2	2	8	11	13
Go-kart racing	18	29	40	42	42
TOTAL	$1,179	$2,098	$4,073	$5,110	$6,132
PROPORTION SUPPORTING WAGES (%)	40	40	40	40	40
DIRECT WAGE REVENUE	$ 472	$ 839	$1,629	$2,044	$2,453
DIRECT JOBS SUPPORTED[2]	31.5	56.0	108.5	136.5	163.5

[1] Excluding event expenditures such as gate charges, concession purchases, etc.

[2] Calculated @ $15,000 per full man-year equivalent of employment.

We estimate, based on the above analysis, that the proposed motorsport centre will generate sufficient direct visitor expenditures external to the events themselves to support more than 30 man-year equivalents of employment annually during its first year of operation. This is expected to increase to more than 160 man-year equivalents annually during the fifth year of operation.

The majority of these tourism related jobs will occur in the food and beverage and accommodation sectors. Most will be seasonal or part-time indicating that many more people will benefit than the equivalent man-year calculation indicates. Most tourism jobs created in the above sectors will directly benefit the municipality in which the motorsport centre is located. In turn, the municipality can be expected realize increased residential stability based on support industry development, increased business licence revenue, and increased availability of serviceable land for potential development.

B. NON-WAGE ECONOMIC BENEFITS ACCRUING TO THE LOWER MAINLAND WILL INCREASE

In a manner similar to that described in Chapter V concerning the present economic impact of motorsport, increased participation and activities projected for the new motorsport centre will generate direct economic benefits to the Lower Mainland in addition to the employment opportunities described above. These future benefits are described in the following paragraphs.

1. Automotive and motorcycle company non-wage revenue will increase by $84 million annually after five years

Chapter V described the current impact of competitive motorsport activity in the automotive and motorcycle industrial sectors. Excluding benefits derived from direct employment, revenue accruing to these businesses which was redistributed for purchases of goods and services in the Lower Mainland, which was retained as profit and which was used to pay taxes approximated $94 million in 1984.

As motorsport activity increases at the new centre, locally based companies can be expected to benefit from increased expenditures on automotive and motorcycle parts, equipment and related services. As was the case for increased employment opportunities in these sectors (...described in the previous section of this chapter..), increased expenditures are expected to parallel motorsport activity at the centre but to be characterized by lower growth rates. The reasons are similar to those described for employment expansion.

Exhibit VIII-10 describes the expected increase in revenue to companies in these sectors due to motorsport centre development which will be redistributed for purchases of goods and services. Since leakage to areas outside of the Lower Mainland including the United States is not expected to change substantially from existing levels for each business category, the numbers projected in Exhibit VIII-10 are based on direct net economic impact estimated for 1984 and are, therefore, net of leakage. Goods and services "increase factors" which relate increases in this type of revenue to overall motorsport activity increases are the same as the "employment increase factors" described earlier in this chapter.

Exhibit VIII-10 shows clearly that the net impact from increased revenue in these sectors which results directly from increased purchases of goods and services from identified Lower Mainland companies is expected to be over $10 million annually during the first year of motorsport centre operation growing to an extra $34.6 million annually during its fifth year of operation.

EXHIBIT VIII-10 Net increase in goods and services purchases by automotive and motorcycle companies[1] (1984 $ x 1,000)

	Net[1] goods & services base	Increase	Net new purchases annually[1]				
Business category	1984	factor	Year 1	Year 2	Year 3	Year 4	Year 5
Manufacturing	$ 262	0.6	$ 149	$ 166	$ 225	$ 55	$ 21
Automobile dealers	3,525	0.3	1,000	912	867	505	161
Auto parts distributors	14,225	0.3	4,037	3,682	4,286	905	326
Auto parts suppliers	876	0.4	331	326	399	89	32
Auto servicing - hi perf.	756	0.8	572	714	1,063	286	108
Auto servicing - general perf.	10,461	0.2	1,979	1,672	1,837	367	131
Tires	370	0.3	105	96	111	24	8
Motorcycle sales/ service	3,566	0.5	1,687	1,765	2,284	535	197
Automobile painting	89	0.3					
Auto electrical services	69	0.3					
Auto seat covers, tops, etc.	10	0.3	140	128	149	31	11
Auto restoration/ customizing	136	0.3					
Auto wheel alignment/ frames	109	0.3					
Auto body repair, etc.	82	0.3					
Automobile wrecking	118	0.4	45	44	54	12	4
TOTAL	$34,654		$10,045	$ 9,505	$11,275	$ 2,809	$ 999
NET IMPACT (excl. base)	$34,654		$10,045	$19,550	$30,825	$33,634	$34,633
TOTAL IMPACT (incl. base)	$34,654		$44,699	$54,204	$65,479	$68,288	$69,287

[1] Net increases from 1984 levels once the motorsport centre becomes operational. Purchase level increases are also net of leakage expected to occur to areas outside the Lower Mainland.

Exhibit VIII-11 provides a summary of expected net increases in profits and taxes for automotive and motorcycle related firms due to motorsport centre development. These projections are based on 1984 levels described in Chapter V and "increase factors" similar to those described above. They do, however, take into account the expectation that profit leakage will occur to areas outside the Lower Mainland as businesses expand and new businesses become established in the Lower Mainland to serve the increasing demand. The "leakage factor" indicated in Exhibit VIII-11 accounts for this profit leakage.

It is evident from Exhibit VIII-11 that Lower Mainland accrual of profit and taxes in the specified sectors are expected to increase by over $15 million annually during the first year of motorsport centre operation increasing to an extra $50 million annually during the centre's fifth year.

Net increases in purchases of goods and services by Lower Mainland automotive and motorcycle companies due to motorsport centre development is combined with net increases in profits generated and taxes paid by the same firms in Exhibit VIII-12.

Total non-wage economic impact (i.e. purchases, profits and taxes) of competitive motorsport in the automotive/motorcycle sectors is seen, in this exhibit, to increase from the 1984 level of $93-1/2 million annually to over $175 million annually once the motorsport centre has been operating for five years.

2. Accommodation, food and beverage company non-wage revenue will increase to $3.4 million annually after five years

Projected expenditures by visitors while in the Lower Mainland to attend or participate in motorsport events at the new centre were estimated earlier in this chapter. The proportion of these expenditures which is expected to support purchases of goods and services and that which is expected to generate profits and contribute to taxation payments is summarized in Exhibit VIII-13.

The non-wage economic impact from motorsport centre development in the accommodation, food and beverage sectors is shown to increase from $432,000 annually during the first year of operation to over $9 million annually during the fifth year of operation.

EXHIBIT VIII-11 Net increase in profits and taxes for automotive and motorcycle companies[1]
(1984 $ x 1,000)

Business category	Net[1] profits & taxes base 1984	Increase factor	Leakage factor	Net new profit & tax accrual annually[1]				
				Year 1	Year 2	Year 3	Year 4	Year 5
Manufacturing	$ 66	0.6	0.9	$ 34	$ 36	$ 48	$ 11	$ 4
Automobile dealers	6,656	0.3	0.9	1,700	1,516	1,735	360	129
Auto parts distributors	36,887	0.3	0.8	8,375	7,300	8,212	2,236	605
Auto parts suppliers	2,866	0.4	0.8	868	803	945	202	73
Auto servicing - hi perf.	262	0.8	0.8	159	181	251	63	23
Auto servicing - general perf.	3,448	0.2	0.9	587	488	530	105	37
Tires	1,308	0.3	0.9	334	298	341	71	25
Motorcycle sales/service	6,803	0.5	0.9	2,896	2,933	3,700	845	309
Automobile painting	51	0.3	1.0					
Auto electrical services	41	0.3	1.0					
Auto seat covers, tops, etc.	7	0.3	1.0	116	106	123	26	9
Auto restoration/customizing	132	0.3	1.0					
Auto wheel alignment/frames	86	0.3	1.0					
Auto body repair, etc.	92	0.3	1.0					
Automobile wrecking	147	0.4	1.0	56	54	67	15	5
TOTAL NET ANNUAL IMPACT	$58,852	N/A	N/A	$15,125	$13,715	$ 15,952	$ 3,934	$ 1,219
CUMULATIVE NET IMPACT (excl. base)	$58,852	N/A	N/A	$15,125	$28,840	$ 44,792	$ 48,726	$ 49,945
TOTAL IMPACT (incl. base)	$58,852	N/A	N/A	$73,977	$87,692	$103,644	$107,578	$108,797

---

[1] Net increases from 1984 levels once the motorsport centre becomes operational. Profit and tax levels are net of leakage outside of the Lower Mainland although taxes are inclusive of provincial and federal tax.

EXHIBIT VIII-12 Direct non-wage benefit in automotive/motorcycle sectors

Type of income generation benefit	Net direct increase in the Lower Mainland (1984 $ x 1,000)				
	Year 1	Year 2	Year 3	Year 4	Year 5
Purchase of goods & services	$ 10,045	$ 9,505	$ 11,275	$ 2,809	$ 999
Realization of profits/payment of taxes	15,125	13,715	15,952	3,934	1,219
Total non-wage direct benefits	$ 25,170	$ 23,220	$ 27,227	$ 6,743	$ 2,218
Cumulative net annual increase	$ 25,170	$ 48,390	$ 75,617	$ 82,360	$ 84,578
Cumulative impact (incl. 1984 base)	$118,676	$141,896	$169,123	$175,866	$178,084

EXHIBIT VIII-13 Direct non-wage economic activity from motorsport event visitors[1] (Accommodation, food and beverage sectors)

	Non-wage visitor expenditures[1] (1984 $ x 1,000)				
	Year 1	Year 2	Year 3	Year 4	Year 5
Total visitor expenditures	$ 1,179	$ 2,098	$ 4,073	$ 5,110	$6,132
Contribution to purchase of goods and services	471	839	1,629	2,044	2,453
Leakage outside[2] Lower Mainland	47	84	163	204	245
Direct Lower Mainland purchases	$ 424	$ 755	$ 1,466	$ 1,840	$2,208
Contribution to profits and taxation[3]	$ 236	$ 420	$ 815	$ 1,022	$1,226
Total non-wage impact	$ 660	$ 1,175	$ 2,281	$ 2,862	$3,434
Net increase (from 1984)	$ 432	$ 947	$ 2,053	$ 2,634	$3,206
Cumulative increase	$ 432	$ 1,379	$ 4,342	$ 6,066	$9,272

[1] Excluding event expenditures such as gate charges, concession purchases, etc.

[2] Estimated at 10% of total goods and services purchased.

[3] Estimated at 20% of total visitor revenue generated.

C. TOTAL DIRECT ECONOMIC ACTIVITY WILL INCREASE BY $110 MILLION ANNUALLY AFTER FIVE YEARS

Economic benefits expected to be generated as a result of motorsport centre development were projected in detail above. They include the following:

- Employment creation
  - from ongoing centre operations
  - from motorsport events
  - in the automotive and motorcycle sectors
  - in the accommodation, food and beverage sectors
- Purchase of goods & services
  - in the automotive and motorcycle sectors
  - in the accommodation, food and beverage sectors
- Realization of profits/ Payment of taxes
  - in the automotive and motorcycle sectors
  - in the accommodation, food and beverage sectors

The total direct economic activity expected to be generated in each of these areas is summarized in Exhibit VIII-14. These totals include base economic activity levels estimated for 1984 which were described in Chapter V.

Exhibit VIII-14 demonstrates that, compared to current levels, the new motorsport centre is expected to generate over $30 million of new direct economic activity in the Lower Mainland during its first year of operation. This new activity, relative to 1984, is shown to increase to over $110 million annually once the centre has been operating for five years.

1. Existing economic benefits will decline without a motorsport centre

It is important for benefit levels to be measured relative to a scale which reflects what would happen should a motorsport centre not be developed. Such a scenario is difficult to project accurately. The future for motorsport is, at best, uncertain should new facilities not be developed. Action Raceway's lease has already terminated and will, according to the lessor, not be renewed. While the lease of Westwood Motorsport Park has been renewed for the 1985 season, improvement restrictions remain in place and, in the medium-term, it is likely that this lease will be cancelled. Mission Raceway's site is secure, but resources are still not available to provide the type of facility required to host drag racing events.

EXHIBIT VIII-14 Total direct economic activity from competitive motorsport with motorsport centre

	Economic Value Millions of 1984 $ (No. of full-time job equivalents)											
Type of economic benefit	1984		Year 1		Year 2		Year 3		Year 4		Year 5	
Employment												
- M/S Centre operations(1)	Negligible		0.14	(4.7)	0.17	(5.5)	0.17	(5.7)	0.18	(5.9)	0.20	(6.5)
- M/S Centre events(2)	Negligible		0.20	(13.5)	0.27	(17.9)	0.33	(22.2)	0.34	(22.9)	0.35	(23.0)
- Auto/motorcycle sectors(3)	$ 20.67	(901)	27.09	(1,178)	33.26	(1,446)	40.62	(1,766)	42.41	(1,844)	43.06	(1,872)
- Tourism sector(4)	0.01	(6)	0.47	(31.5)	0.84	(56.0)	1.63	(108.5)	2.05	(136.5)	2.45	(163.5)
Goods & services												
- Auto/motorcycle sectors	34.65		44.70		54.20		65.48		68.29		69.29	
- Tourism sector	0.01		0.42		0.76		1.47		1.84		2.21	
Profit/taxes												
- Auto/motorcycle sectors	58.85		73.98		87.69		103.64		107.58		108.80	
- Tourism sector	0.05		0.24		0.42		0.82		1.02		1.23	
Total Direct Benefits	$114.24	(907)	$147.24	(1,228)	$177.61	(1,525)	$214.16	(1,902)	$223.71	(2,009)	$227.59	(2,065)
Direct Benefit Inc. From 1984	--		$ 33.0	(321)	$ 63.4	(618)	$ 99.9	(995)	$ 109.5	(1,102)	$ 113.4	(1,158)

(1)Average salary/man-year estimated at $30,000.
(2)Average salary/man-year estimated at $15,000.
(3)Average salary/man-year estimated at $23,000.
(4)Average salary/man-year estimated at $15,000.

We have assembled a set of assumptions which describe what may occur should the proposed motorsport centre not be developed. These assumptions are necessarily hypothetical and speculative. They will, however, provide some appreciation of the comparative benefits of the proposed centre over time. The assumptions are as follows:

- Action Raceway operations cease in 1985 and a replacement facility is not constructed.
- Mission Raceway continues its present scope and level of operations.
- Westwood Motorsport Park continues to operate in its present location with activity levels gradually declining due to deteriorating facilities. A new location is found and road course facilities are developed and become operational in 1988. Capability of the new development is lower than that anticipated for the proposed motorsport centre.

Making use of these assumptions, we have prepared an economic activity scenario which reflects what may happen without the proposed motorsport centre. Spectator-day forecasts associated with this scenario are described in Exhibit VIII-15.

Economic activity forecasts associated with competitive motorsport under this scenario were developed using an analysis similar to that used for estimating economic activity with the proposed motorsport centre. As motorsport activity declines, business "decrease factors" were applied in a manner similar to that in which "increase factors" were applied earlier in this chapter and for the same reasons. Using weighted average factors for the economic activity concerned, an estimate of overall economic activity under this scenario was developed and is summarized in Exhibit VIII-16.

The projections of Exhibit VIII-16 indicate clearly that current economic activity resulting from competitive motorsport is expected to decline should a motorsport centre not be developed. The decrease in benefit levels shown for 1985 will result, principally, from the closure of Action Raceway. Continuing decreases during 1986 and 1987 are expected to result from the gradual deterioration of Westwood facilities and the consequential decline in interest and attendance. Some of this lost revenue and financial inertia is expected to be regained once a new road course becomes operational in 1988.

EXHIBIT VIII-15 Spectator-day forecasts without a motorsport centre

	Annual spectator-days by type of event						
	1984 (Base)	1985	1986	1987	1988	1989	1990
Drag racing	2,000	2,000	2,000	2,000	2,000	2,000	2,000
Oval track racing	18,000	--	--	--	--	--	--
Automobile racing	24,000	22,800	21,700	20,600	27,000	64,000	106,800
Motorcycle road racing	14,000	13,300	12,600	12,000	16,600	22,800	30,000
Off-road racing[1]	--	--	--	--	--	--	--
Motocross	1,000	1,000	1,000	1,000	1,000	1,000	1,000
Go-kart racing	8,000	7,600	7,200	6,900	7,500	9,000	11,000
TOTAL	67,000	46,700	44,500	42,500	54,100	98,800	150,800

[1] Estimates for off-road racing attendance without a motorsport centre are assumed to be zero since organized events of this type are not presently staged at established Lower Mainland facilities. A significant number of individuals do participate in this activity, however, in an unorganized manner or at events held outside of developed facilities.

EXHIBIT VIII-16 Total direct economic activity from competitive motorsport without motorsport centre

Type of economic benefit	Economic Value Millions of 1984 $ (No. of full-time job equivalents)													
	1984		1985		1986		1987		1988		1989		1990	
Employment														
- M/S Centre operations	Neg.		Neg.		Neg.		Neg.		Neg.	(1.0)	Neg.	(1.5)	Neg.	(1.5)
- M/S Centre events	Neg.		Neg.		Neg.		Neg.		0.1	(4.0	0.1	(6.0)	0.2	(10.0)
- Auto/motorcycle sectors	$ 20.7	(901)	$ 18.6	(810)	$ 18.3	(797)	$ 18.0	(785)	$ 19.6	(856)	$ 25.0	(1,090)	$ 29.4	(1,282)
- Tourism sector	Neg.	(6)	Neg.	(6)	Neg.	(5)	Neg.	(5)	Neg.	(7)	0.1	(9)	0.2	(14)
Goods & services														
- Auto/motorcycle sectors	34.7		31.2		30.7		30.2		32.9		41.9		49.2	
- Tourism sector	Neg.		Neg.		Neg.		Neg.		Neg.		0.1		0.2	
Profit/taxes														
- Auto/motorcycle sectors	58.9		53.0		52.2		51.4		56.0		71.3		83.7	
- Tourism sector	0.1		Neg.		Neg.		Neg.			0.1		0.1		
Total Direct Benefits	$114.2	(907)	$102.8	(816)	$101.2	(802)	$ 99.6	(790)	$108.6	(868)	$138.6	(1,107)	$163.0	(1,308)
Direct Benefit Increase (Decrease) From 1984	--		$(11.4)	(91)	$(13.0)	(105)	$(14.6)	(117)	$ (5.6)	(39)	$ 24.4	200	$ 43.8	401

Neg. = Negligible

2. Net benefit increases with motorsport centre development will reach a peak in 1988

Should the assumptions described above concerning what is likely to happen without a motorsport centre prove valid, it is important to examine the comparative benefits to the Lower Mainland under the "non-motorsport centre" scenario with those under the "motorsport centre" scenario. It is, effectively, the difference between these two projections which represents the true economic value of developing the proposed centre.

Exhibit VIII-17 displays graphically the direct economic benefits expected to accrue to the Lower Mainland under each of these scenarios. The exhibit was constructed under the assumption that the motorsport centre would become operational in 1986.

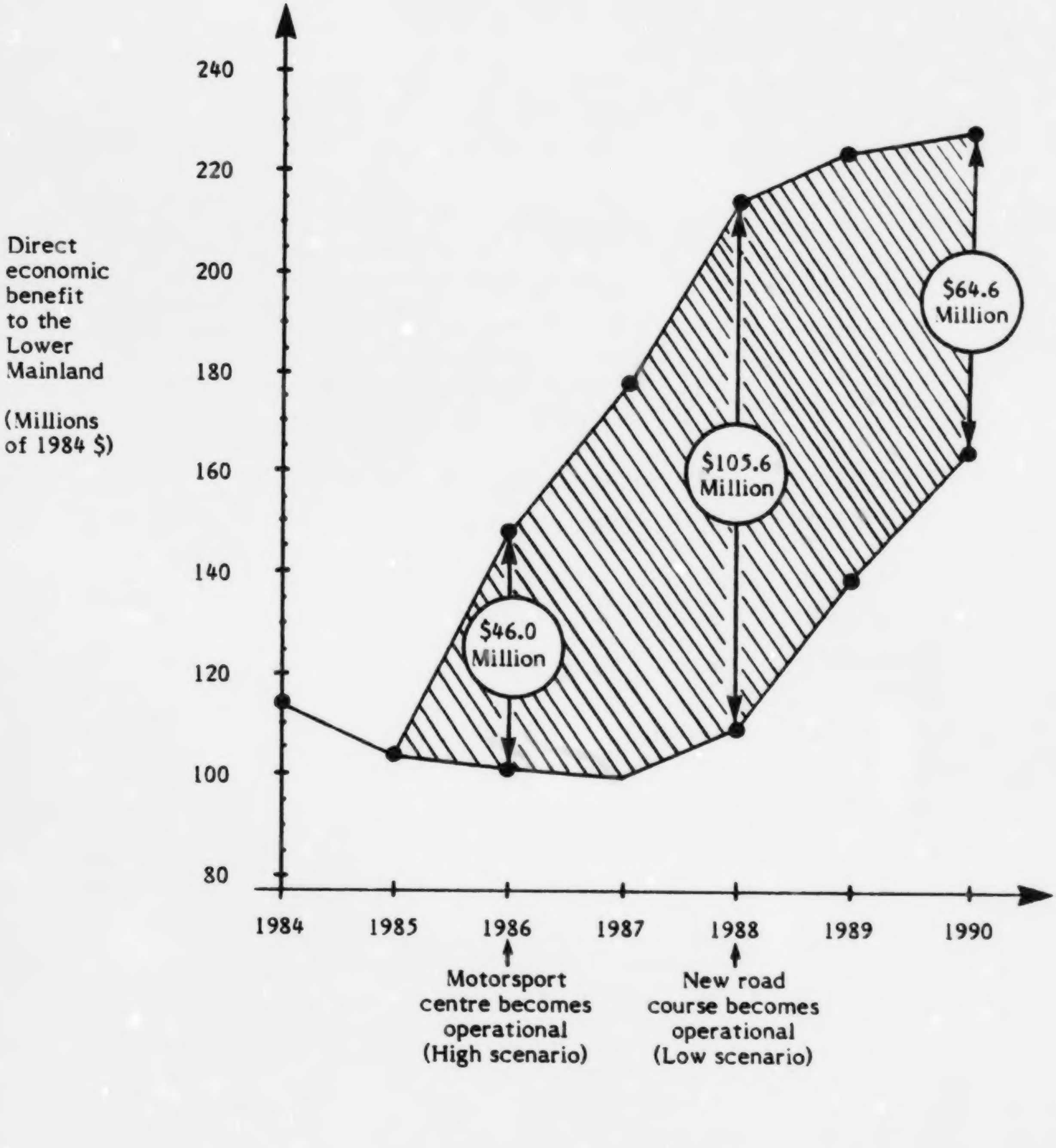
As activity declines without motorsport centre development between 1984 and 1987, the net impact from developing a centre in 1986 is seen to increase from $46 million annually in that year to $78 million annually in 1987 and to $105.6 million annually in 1988. The net effect of motorsport centre development is then projected to decrease on an annual basis to $85 million annually in 1989 and to $65 million annually in 1990. It is important to recognize that this decline in net impact is based on the expectation that a major investment would be made to develop a road racing course in 1988. Should this not occur, the net benefits arising from motorsport centre development in 1987 would continue to increase beyond the $106 million annual peak shown to take place in 1988 in Exhibit VIII-17.

D. THE MULTIPLIER EFFECT WILL SIGNIFICANTLY INCREASE ECONOMIC BENEFITS ACCRUING TO THE LOWER MAINLAND

Direct economic activity generated by competitive motorsport has been discussed in some detail to this point in the report. Leakage of these direct expenditures has been factored into the base economic activity and the economic projections so that the net effect of direct economic benefits have been described.

The direct economic activity described represents the first round of expenditures in the Lower Mainland economy. Once these expenditures have been realized, the revenue will be redistributed throughout the economy through subsequent levels of spending. For example, wages earned by automotive company employees will be re-spent to purchase goods and services locally. Similarly, revenue spent locally by automotive companies on goods and services will be re-spent, in turn, by those businesses from which the goods and services are purchased. The economic effect of this continual re-spending of direct or initial levels of revenue is accounted for in economic analysis methodology by applying a "multiplier" to the initial round of spending.

EXHIBIT VIII-17 **Comparison of direct economic benefits due to motorsport centre development** (Millions of 1984 $)



As re-spending of direct economic activity takes place, leakage of the dollars redistributed occurs from the regional economy of concern, in this case the Lower Mainland. The extent to which this leakage occurs depends on the size and nature of the local economy, and in particular on the extent to which supplies to local businesses come from other enterprises and individuals within the same area. Generally, smaller and more rural regions experience relatively greater leakage to outside suppliers. Leakage from the Lower Mainland is expected to be limited due to the size and diversity of the local economy. Thus, respending of direct economic benefits results in increased output locally which generates increased demand for local labour and supplies.

Many opinions exist on appropriate multiplier levels within various industries and within various economic regions. There is, however, universal recognition that the "multiplier effect" does represent additional economic benefits beyond the direct benefits described earlier.

For purposes of this study, economic multipliers for the Lower Mainland are used based on previous detailed work undertaken in this area[1]. This previous work estimates multipliers by industrial sector for the Vancouver metropolitan area as shown in Exhibit VIII-18.

EXHIBIT VIII-18 Vancouver metropolitan area multipliers

Industrial sector	Sales multiplier	Household income multiplier
Construction	1.81	0.94
Food and beverage	1.61	0.48
Wood products	1.55	0.62
Chemicals and petroleum	1.17	0.13
Manufacturing	1.54	0.62
Trade and transportation	1.69	0.82
Health and welfare	1.71	0.95
Education	1.88	0.98
Households	0.95	1.42

[1] Mark L. Ford -- "A Linear Programming Model of the Vancouver Metropolitan Area Economy" -- M.A. Extended Essay -- Simon Fraser University -- 1980.

The first multiplier, the "Sales multiplier," is commonly used to measure the effects of first round spending on economic activity or total sales in an area. The second, the "Household income multiplier," measures the impacts of revenues on incomes to the residents of an area as a result of direct and indirect activity.

Application of the multipliers described in the above table to direct economic activity attributed to competitive motorsport as described earlier, results in the indirect and induced economic activity shown in Exhibit VIII-19.

EXHIBIT VIII-19 Indirect and induced economic activity from motorsport centre development (Millions of 1984 $)

		Motorsport centre operational year				
	Base (1984)	Year 1	Year 2	Year 3	Year 4	Year 5
Total direct benefits	$114.2	$147.2	$177.6	$214.2	$223.7	$227.6
Total indirect/ induced benefits[1]	177.0	228.2	275.3	332.0	346.7	352.8
Net increase (excl. base)	--	51.2	98.3	155.0	169.7	175.8
Total indirect/ induced resident revenue[2]	57.1	73.6	88.8	107.1	111.9	113.8
Net increase (excl. base)	--	16.5	31.7	50.0	54.8	56.7

[1] Calculated using an average sales multiplier of 1.55.

[2] Calculated using an average household income multiplier of 0.50.

Direct benefits represent first round spending which accrues to the regional economy. Indirect benefits are generated by subsequent levels of spending of the first round expenditures. Induced benefits accrue to other sectors outside of the actual spending and re-spending patterns and result from overall increased economic activity in the region.

Exhibit VIII-19 should be interpreted as a reasonable indicator that new indirect and induced benefits derived from development of a new motorsport centre are expected to total over $50 million annually during the first year of operation and about $175 million annually during the fifth year of operation. Included in these estimates are new indirect and induced benefits derived by Lower Mainland residents totaling over $16 million annually in Year 1 and over $56 million annually in Year 5.

Relative to 1984 levels of direct, indirect and induced economic activity derived from competitive motorsport, the economic benefits associated with motorsport centre development are summarized in Exhibit VIII-20.

EXHIBIT VIII-20 Total increase in Lower Mainland economic activity due to motorsport centre development (Millions of 1984 $)

	Annual benefits of competitive motorsport					
	Base (1984)	Year 1	Year 2	Year 3	Year 4	Year 5
Total direct benefits	$114.2	$147.2	$177.6	$214.2	$223.7	$227.6
Total indirect/ induced benefits	177.0	228.2	275.3	332.0	346.7	352.8
Total economic benefit	291.2	375.4	452.9	546.2	570.4	580.4
Net increase from 1984	--	$ 84.2	$161.7	$255.0	$279.2	$289.2

The above exhibit indicates that total projected economic activity from competitive motorsport (including direct, indirect and induced effects) is expected to increase by $84 million annually during Year 2 and by close to $290 million annually during Year 5 relative to existing levels should the proposed project proceed. These increased benefits represent the true impact in the Lower Mainland from motorsport centre development but include re-spending of direct benefits projected and, therefore, account for some of the less obvious economic activity generated.

IX

SOCIAL AND ENVIRONMENTAL DIMENSIONS OF MOTORSPORT

Motorsport is currently a popular activity on the Lower Mainland and indeed throughout North America. Its economic value in Southwestern British Columbia has been clearly described in the preceding chapters of this report. The sport and its associated popularity, however, is associated with a variety of environmental concerns as well as a number of social benefits and concerns.

While the social and environmental dimensions of motorsport were not the primary focus of this study, each was investigated to a limited extend. This chapter discusses the social and environmental concerns and opportunities associated with motorsport in the Lower Mainland. It is felt that these factors must be addressed in this report so that those who will support motorsport centre development in the Lower Mainland will be familiar with all of its benefits and costs.

A. PROBLEMS ATTRIBUTABLE TO EXISTING MOTORSPORT FACILITIES ON THE LOWER MAINLAND ARE RELATIVELY MINOR

Research was carried out into environmental problems which have been experienced due to past motorsport activity in the Lower Mainland. In general, only a limited number of negative impacts were found. Generally, the public tends to be concerned about such factors as noise and traffic when motorsport activity is discussed. The substantial economic activity associated with motorsport, which was described earlier, when compared with actual negative impacts, indicates clearly that problems experienced on the Lower Mainland are almost negligible relative to the benefits derived.

1. Few problems exist at Westwood Motorsport Park

The Coquitlam RCMP has reported few problems concerning motorsport activity at Westwood. Noise remains the most common problem but there are very few complaints. Traffic problems, from the police perspective, are minor. The track itself reports that some congestion does exist during major events due to the limited access and egress at the facility.

According to local officials, behavioural problems, especially those related to drugs or liquor, are minor. Since the track is required to police itself internally with its own security system, the Coquitlam Police Department only occasionally observes problems relating to marijuana or liquor near the track.

Serious incidents are not reported to occur at Westwood. The police establish roadblocks on major event weekends, if there is a complaint, to screen offenders before an event. This approach stops problems from developing. If problems occur within the track and impact on the community, the police do not hesitate to consult with the track's manager to suggest remedial steps to be instituted by track officials.

There has been only one fatality at the track, a result of a racing vehicle colliding with a deer that had entered the track.

2. Occasional complaints concerning noise used to result from Mission Raceway operations

When Mission drag strip was in full operation, the most frequent complaints centered on noise. These problems no longer exist. According to the Mission RCMP, rowdiness has not been a problem at the Mission facility and liquor concerns have been handled by the use of road blocks. Experience has shown that liquor is a minor problem. Few traffic congestion problems of significance have been experienced during major drag racing events in the past.

3. Negative impacts resulting from operations at Action Raceway would be resolved with a new centre

A number of complaints have been received concerning oval track operation at Action Raceway. These complaints are primarily the results of residential housing located near the facility and the fact that the facility is located in Campbell Valley Regional Park.

Action Raceway, originally Langley Speedway, predates the establishment of Campbell Valley Regional Park in which the facility is now located. With the development of the park, and its classification as a nature park, conflicts were bound to arise concerning competitive motorsport activity at Action Raceway. In recent years, specific problems reported concerning motorsport events focussed on noise generation and traffic, especially on 208th Street. Much of the noise was contained within the park itself. However, spill-over into immediately adjacent recreational areas has been experienced.

The operational flexibility of Action Raceway has been cut back substantially in recent years due to inconsistencies between motorsport activity and the nature park. Late in 1984, the Greater Vancouver Regional District decided not to renew the facility's lease for the 1985 season.

It is evident that the conflict which Action raceway found itself in after years of operation should, and would, be avoided at a new motorsport centre. Site selection criteria indicate clearly that the new facility should be well away from both current and future residential areas. Furthermore, the utilization of the land on which the centre will be located should be compatible with the motorsport activity which will be generated. For example, an industrial park and/or visitor oriented facilities would make sense given the demands for light industry and visitor services related to motorsport activity.

In summary, while concerns over motorsport activity at Action Raceway have been real, these concerns are not expected to be repeated at the new motorsport centre. Experience gained would ensure that negative impacts would be minimized or negated entirely.

B. SOCIAL BENEFITS TO CHARITABLE ORGANIZATIONS WOULD BE REALIZED FROM MOTORSPORT CENTRE DEVELOPMENT

Little is known by the general public concerning the benefits which various charitable organizations on the Lower Mainland realize from competitive motorsport. A discussion on this positive social impact is provided in the following paragraphs.

1. Service Groups Raise Funds through Motorsport

An example of positive social benefits from motorsport is represented by Westwood Motorsport Park. Westwood has encouraged arrangements which help, not only the track, but charitable organizations. Over the last several years, a variety of community organizations have benefitted from the presence of a motorsport facility.

The Eagle Ridge Hospital Ladies Auxiliary has undertaken responsibility for the entry gates on race weekends at Westwood, raising $1,000-$1,500 a season for their Auxiliary's activities. The Auxiliary is still interested in carrying out this activity and regards it as a valuable method of fund raising. In 1984, the Coquitlam Lions Club operated a beer garden and concession on several occasions with net income of $2,000-$3,000. They were very pleased with the arrangement and would like to continue this at Westwood during 1985. Radio stations such as CFOX have, through Westwood racing promotions involving major oil companies, generated donations for the station's Children's Fund. The Variety Club benefits directly from these donations.

2. Motorsport Clubs are developing a community service attitude

The year 1984 marked the commencement of the first Kruise for Kids, sponsored by the Vancouver Camaro Club. Up to 180 cars drove in a cavalcade to present toys to the Vancouver Christmas Bureau. During 1985, an increase to 400 cars is anticipated. Other motorsport clubs such as the B.C. Motorcycle Association have similar programs with their Toys for Tots program. Approximately 1,900 bikes in a three mile procession participated in this its seventh annual event. The Greater Vancouver Street Machines Club also gives a percentage of event proceeds to charitable groups.

3. Motorsport will have a growing role in fund raising

The social oriented activities described above, the direct use of motorsport facilities by charitable groups and fund raising by clubs, are in their infancy. Discussions with six Lions Clubs in the vicinity of the three existing facilities indicate that concession operations and similar activities are highly desirable fund raisers for the clubs involved. Traditionally, service clubs such as these, are geographically limited to projects within their own areas. All felt that a motorsport centre could provide excellent opportunities for their own or similar organizations. In particular, club representatives noted that, as volunteers, they do not want to run operations every week. However, given the number of clubs on the Lower Mainland, agreeable arrangements could likely be made for regular involvement of these organizations at the proposed centre.

Finally, it is apparent that many of the motorsport clubs on the Lower Mainland are also developing a social awareness that will strengthen their participation in activities that assist specific groups of individuals. A motorsport centre may well provide the incentive and initiative to enhance this social benefit to Southwestern British Columbia.

4. Motorsport is considered suitable for Little Brothers and is encouraged

Existing motorsport facilities on the Lower Mainland have sponsored, and indeed encouraged, the attendance of children at events. The Big Brothers of Greater Vancouver have had children attend events at Westwood. The Little Brothers, aged 7-13, enjoy attending car events such as races, rallies and tractor pulls. Some of the events at Westwood, as well as those at B.C. Place, have been considered suitable family entertainment for these children. As the average age is eleven years, many of the children involved would also be interested in participative events such as driver education, go-karts racing or vehicle maintenance.

Action Raceway has sponsored groups of boys from the Big Brothers of Langley by providing passes to various events. The boys typically attend three or four events a year and really enjoy the races. A key factor for groups like Big Brothers is the affordability of these events.

5. Motorsport represents big business for charities in the U.S.A.

The social benefits and value of motorsport activity on the Lower Mainland can be increased substantially. This expectation is supported by experience in the United States. In Monterey, California, the Sports Car Racing Association of the Monterey Peninsula contributed $450,000 to area charities and the Monterey County parks department in 1984. The funds were allocated to the more than forty charity and civic organizations which assist the Club in staging five major motorsport events held each year at Laguna Seca Raceway.

C. SOCIAL BENEFITS COULD BE INCREASED WITH A MOTORSPORT CENTRE

As has been described in some detail in other studies[1] motorsport is a very popular recreational pursuit for Lower Mainland residents. This popularity, in combination with the increasing shortage of adequate motorsport facilities, has resulted in a variety of social concerns and problems which could, in part, be resolved should a motorsport centre be developed.

1. Street dragging does occur

Street dragging is a fact of life in parts of the Lower Mainland. This is most noticeable where the terrain is level, roads are straight and pavement exists which is several lanes wide. The main street drag areas are located in Surrey, Langley and parts of Delta, such as Annacis Island. The police in these communities are aware of the "street rod" owners who search for locations to make competitive use of their vehicles. Night-time rendezvous are common and vehicle owners are frequently charged when arrested by local police..

While police can and do intervene when street drag locations have been identified, this disruption to various communities will only decline once a proper drag racing facility is developed. Certainly, not all street dragging would cease with motorsport centre development. Nonetheless, there are many vehicles on the road with high performance capability which would make use of the centre. It is expected that street drag racing would decline along with the related safety problems and negative impacts should the proposed motorsport centre be developed.

2. The mis-use of motorized dirt bikes is a growing concern

The popularity and availability of dirt bikes (off-road motorcycles) combined with the lack of suitable riding locales has resulted in many conflicts. Most people who ride dirt bikes are young, aged 10-14, although mini-bikes are handled by children as young as 6-7 years. Because of their age, the riders are not licensed and, legally, are only permitted to ride on private property with the permission of the owner. Typically, most children obtain these mini- or dirt bikes on the premise they will ride on their own property. However as groups of children, they quickly find themselves searching out terrain where they can enjoy their vehicles in each others company. This recreational pursuit is growing in popularity with higher age groups which compounds the problems which exist.

---

[1] Lower Mainland Motorsport Centre - Preliminary Assessment" -Novacorp Consulting Inc. - November 1983.

More often than not, individuals ride their dirt bikes on public roadways, rather than walk them or transport them. This provides a major conflict with regular traffic. The sites chosen for riding tend to be uninhabited but often involve public land such as dykes and parks or private land. In neither case are the riders authorized to use the sites.

The bikes, because they are off-road oriented, are noisy, pollute the air and are capable of doing considerable terrain damage. Probably of greater concern is the damage, which is inflicted not only on land in general, but on wildlife habitats and occasionally, the very purpose of the site (i.e. damage to dykes). These are predominantly environmental conflicts.

Because the activities are generally unsupervised and many riders are young, judgements can be poor and accidents are common. In Delta, the police recalled a situation where two riders collided head-on coming over a rise, resulting in paralysis for one child. An organized track with a one-way system would have avoided this unfortunate incident.

Another negative impact associated with unorganized dirt bike activity is that anti-social attitudes are being formed in the young people involved. Many willingly break the law in riding on the street under age, trespass or cause wilful damage. The police, because of the age of the children, rarely prosecute. Some parents, before they buy a vehicle, do try to determine where a child could properly use the bike. Many, however, do not bother and once the bike is purchased, do not supervise.

Discussions with police departments in Mission, Coquitlam, Delta, Surrey and Langley, as well as the B.C. Forest Service in Vancouver and Chilliwack, indicate clearly the need for places for motorized dirt bike riding. It is doubtful that a motorsport centre would eliminate most of the present problems but it would help. It would also provide a place for youth clubs to congregate and for children in general to be educated concerning the full capabilities of their bikes in a safe environment. Because of the young age of many riders, considerable parental cooperation would be required. Most police departments contacted welcomed an alternative such as the proposed centre but cautioned that it would not stop all of the abuse. Many commented that increased public education programs, greater community involvement programs and the like will go a long way to minimize the anti-social attitudes in some individuals. It is apparent that attitudes need changing and that a number of locations are required. A motorsport centre would help with training and skill enhancement, would serve as a focus for youth club activity and would provide a site for occasional use by local youth in the immediate area. It would also facilitate the enforcement of existing laws.

3. Few acceptable sites on the Lower Mainland are available for four-wheel drives vehicle owners

The B.C. Forest Service has encountered both four-wheel drive vehicles and off-road motorcycles in a variety of land-use conflict situations. Four-wheel drive vehicles are permitted to use logging roads in off hours (i.e. on weekends and after 6 p.m.) but are frequently in conflict with other vehicles. Because of the aggressive style of driving associated with the recreational use of four-wheel drives, head-on impacts with similar vehicles are possible. Further, our research has indicated that four-wheel drive vehicles and off-road motorcycles are not compatible on the same route.

Experience in the Lower Mainland indicates that four-wheel drive vehicles have ruined cross-country ski trails for winter use and off-road motorcycles have destructively used hiking trails in the summer. Both uses conflict directly with other sports. Vandalism has also been experienced by the Forest Service which has resorted to the use of helicopters to confront culprits in the Chilliwack Region.

In the Fraser Valley, the majority of four-wheel drive vehicle operators are from Surrey and areas west, including all of Greater Vancouver. Few suitable sites exist for these people within the Vancouver area. As a result, many owners make use of recreation sites in the Valley. The Forest Service is developing estimates of users but these are not yet available. The service is also investigating sites in the Chilliwack River Valley and near Hope which would be suitable for this type of use. Hemlock Valley is also considering a motocross circuit with a road/gravel loop and, possibly, an enduro course.

The Forest Service acknowledges the merit of a motorsport centre with an off-road and a motocross track for competitive events. This would allow the off-road sites in the Valley to focus on utilization by individuals or small groups use. In conclusion, while the proposed motorsport centre would not solve all of the social and environmental problems associated with off-road vehicles and motorcycles, it would reduce the problems and represent a valued asset by organizations responsible for policing these activities and for preserving the environment.

D. NOISE IMPACTS OF THE MOTORSPORT CENTRE CAN BE MANAGED

Those responsible for promoting motorsport centre development on the Lower Mainland recognize that concerns regarding noise generation must be addressed and resolved. Existing Lower Mainland motorsport facilities have achieved significant reductions in noise generation by event scheduling and through the requirement for mufflers on the vehicles themselves. Other methods of noise attenuation have been successfully implemented at other North American motorsport centres and state-of-the-art technology will be used to this end on the Lower Mainland should the proposed development take place.

It is evident that noise attenuation is possible to bring this impact to within acceptable levels. This procedure is also facilitated and becomes more effective when designed into a facility from the earliest stages of planning.

Previous work[1] concerning noise attenuation at the motorsport centre has reinforced this position by stating, in part:

> In summary, some negative impacts from noise generation in the immediate area of the motorsport centre can be expected. Sound attenuation measures can reduce the severity of this impact and capital costs for appropriate measures have been included.

If developed, the motorsport centre will include both capital and operating measures to reduce impacts due to noise generation. It should be recognized, as well, that the very selection of an appropriate site will ensure that the population in the Lower Mainland likely to be affected by the limited noise that does occur, will be minimal since proximity to existing or future residential areas will be avoided.

In concluding this chapter, it is worthwhile to quote a recently completed study[2] of noise impact resulting from motorsport centre development which was in the Los Angeles area. The centre is planned to include an NHRA sanctioned drag strip, an oval track and a motocross track. It should also be noted that drag racing is generally recognized to generate the highest levels of noise compared to other motorsport events. During this study three separate raceways were visited along the West Coast to obtain reliable data. It concluded, in part, the following:

> Hillside residential areas will generally be more aware of the operation of the site than flatland areas. In fact, in some flatland locations nearby, it will be very difficult to hear the operations.
>
> At no time would any area ever exceed local noise criteria.
>
> With the proposed berming around the track, the only areas where there will be a perception of operations is in the hillside homes. This will occur only during the runs of fuel powered cars, or 1.1% of the total period of operation. At no time will the events interfere with normal conversational activity.
>
> Inside the houses, the highest level events will be barely perceptible and then only if no other activity is occurring.

---

[1] Lower Mainland Motorsport Centre - Preliminary Assessment" -Novacorp Consulting Inc. - November 1983.

[2] Environmental Noise Analysis of Los Angeles County Raceway" --Gordon Bricken & Associates, Santa Ana, California.

X

IMPLEMENTATION GUIDELINES

The study document represents only the initial step in the process towards motorsport centre development. It does provide valuable data and information which can be utilized during this process and which should enable both the public sector, at all levels, and the private to recognize the magnitude of the opportunity represented by this project.

This chapter describes a number of issues relating to motorsport centre implementation which have arisen during our work. It is hoped that these guidelines will facilitate the ongoing planning, negotiation and development process.

A. MOTORSPORT GROUPS WILL NEED TO TAKE THE LEAD ROLE DURING THE IMPLEMENTATION PROCESS

Initiatives already undertaken by existing motorsport facility operators and clubs on the Lower Mainland have been considerable and have led directly to a partnership with the Provincial Government for the conduct of this study. The existence of the British Columbia Association of Motorsport Facilities (BCAMF) is considered to be a valuable asset that should continue to play a vital role in facilitating the planning, negotiation and development process associated with the proposed motorsport centre.

At the time this study was conducted, a variety of actions were still required to bring the motorsport centre development to fruition. Included in this process are the following important steps, listed in approximate order of priority:

- Identification, negotiation and acceptance of a suitable site for the complex.
- Identification and analysis of an organizational and financial structure.
- Discussion, negotiation and conclusion of involvement by both the public and the private sectors.
- Project financing.

- Preparation of operator bid requests and evaluation of these bids (...depending on the organizational/operation structure adopted).
- Detailed planning and design of the centre.
- Preparation of the calls for construction tenders.
- Motorsport centre construction.

It is evident, at this stage, that the motorsport groups themselves, likely through the BCAMF, will need to take the lead role in continuing the implementation process. Certainly both provincial and municipal governments have shown interest in the project and are expected to support it as the plans come together. It will be the BCAMF, however, that needs to spearhead the development and which will need to act as implementation agents for the motorsport centre.

As specific successes are achieved along the road to development, it may be appropriate for other groups (e.g. a private investor/developer/operator group) to take over as the primary instigator of development at some time in the future. This will, of course, depend on the specific characteristics of the most realistic financing/operational alternative. Regardless of who eventually controls the development and operation, it will be essential for the needs and objectives of the motorsport groups on the Lower Mainland themselves to be fully and adequately met on a long-term basis. It is, after all, these groups and their members who have brought the project to its present status and who account for most of the economic activity experienced in the past and who will account for most of the economic activity in the future.

B. SECURING AN APPROPRIATE SITE IN CONJUNCTION WITH MUNICIPAL SUPPORT IS THE NEXT CRITICAL STEP

The site for the proposed motorsport centre will be extremely important. It must meet a variety of criteria which will impact directly on the ongoing appeal and viability of the project. Of critical importance, is that the site selected be located within a municipality that is supportive of the motorsport centre and that can gain substantially from both the social and economic benefits expected to be generated by the facility.

Earlier chapters of this report described both economic and social benefits expected to accrue to the Lower Mainland due to motorsport centre development. Many of these benefits are expected to be generated within the municipality where the facility is located. The project, therefore, represents a major opportunity for municipal development and a variety of Lower Mainland municipalities have already expressed interest to this end in the proposed development.

Securing an appropriate site on which development can be effectively planned and designed represents the next critical step during the implementation process. Since benefits will accrue to the motorsport groups, the Lower Mainland as a whole and the municipality where the centre is located, it is considered essential that the BCAMF, the Provincial Government and the chosen municipality work closely and harmoniously together to bring the development to successful realization.

C. CONTINUING UNITY AND TIMING ARE CRITICAL ELEMENTS OF IMPLEMENTATION

The co-ordination of many diverse motorsport groups on the Lower Mainland under the BCAMF umbrella and the operation of this group with a united voice is one of the key ingredients of success achieved to-date. We consider it to be essential for the BCAMF to continue to function in a harmonious manner and to continue to represent Lower Mainland motorsport groups in a united way for the motorsport centre development to be achieved.

We also feel strongly that the process towards implementation should proceed rapidly. Development of a motorsport centre for operation by 1986 is considered ideal.

Results of our economic analysis demonstrate clearly that economic benefits will be lost if there is any appreciable loss of time in implementing this project. The closure of Action Raceway for the 1985 season compounds existing problems and increases the urgency of a motorsport centre development. We also feel that a recognizable level of interest in and momentum towards the development of the project has been achieved over the past twelve months. These achievements should be capitalized on. Should this momentum not be forthcoming during the implementation process, the danger exists that interest will decline, making it more difficult to bring the complex to a reality in the near future.

In summary, the proposed motorsport centre represents a major opportunity for motorsport groups on the Lower Mainland, businesses in this area, the population at large, the municipality where the complex is located and the Provincial Government. This opportunity needs to be pursued without undue delay so that the benefits it represents can be maximized for all concerned.

APPENDICES

Appendix A Terms of Reference -- Lower Mainland Motorsport Centre Economic and Market Study

Appendix B Motorsport Facilities in the Lower Mainland

Appendix C Conceptual Physical Description of the Proposed Centre

Appendix D Motorsport Facility Case Studies

Appendix E Market Research of Lower Mainland Residents

Appendix F Market Research of Lower Mainland Participants

Appendix G Market Research of U.S. Participation in Motorsport

Appendix H Economic Characteristics of the Motorsport Industry

Appendix A

TERMS OF REFERENCE
LOWER MAINLAND MOTORSPORT CENTRE
ECONOMIC AND MARKET STUDY

MARKET ANALYSIS AND ECONOMIC BENEFIT STUDY
LOWER MAINLAND MOTORSPORT CENTRE
TERMS OF REFERENCE

BACKGROUND

Motorsport comprises a wide variety of activities and events including oval track racing, circuit racing, drag racing, motocross events, four-wheel drive events, automobile group social events and swap meets amongst others. It is amongst the most popular sports in North America and its popularity is growing rapidly in many areas of the continent.

Motorsport in the Lower Mainland has a long history. Events and activities have always been popular and have been well attended by Lower Mainland residents, residents from other areas of British Columbia and Alberta, and residents from the U.S. Pacific Northwest. Cross-border rivalries in motorsport events have generated a substantial amount of tourism activity in British Columbia over the years.

During the last several years, facilities on the Lower Mainland that presently accommodate motorsport activity have faced various problems, difficulties and pressures. These facilities and the status of each is summarized below.

- ACTION RACEWAY - This 1/4 mile paved track accommodates oval track racing of various kinds. Operated by the Lower Mainland Oval Racing Association, the facility is located in Campbell Valley Regional Park, leased from the G.V.R.D. Since the area is considered a nature park, L.M.O.R.A. has been under considerable pressure in recent years to relocate the facility due to incompatibility between these two park uses. Lease renewals are provided only on a yearly basis at the present time, which is inconsistent with the long-term objectives and requirements of the facility.

- MISSION RACEWAY - The raceway, located on the banks of the Fraser River, includes a sand drag strip, a motocross track and ancillary facilities. The track remains unpaved after years of negotiations by its owner and operator, the British Columbia Custom Car Association, to obtain the funding to provide the type of facility required by drag racing enthusiasts. While numerous activities and events continue to be held at Mission, many drag racers now go to tracks in the U.S. to compete due to inadequate facilities on the Lower Mainland.

- WESTWOOD MOTORSPORT PARK - Located on the Westwood Plateau in Coquitlam, Westwood has hosted circuit racing events, for automobiles, motorcycles and go-carts, etc. for many years. Operated by the Sports Car Club of British Columbia, the facility is coming under pressure to relocate as plans for both gravel extraction and housing development in the area are coming closer to implementation. Presently the site is leased from the Ministry of Lands, Parks and Housing and, while short-term extensions are likely, the lease agreement expires at the end of 1984.

Motorsport activity is recognized by the Government of British Columbia as being a significant industry on the Lower Mainland. Hundreds of automotive-related companies depend on motorsport for a significant portion of their business. In addition, events which are held at Lower Mainland facilities attract United States residents to the Province and therefore account for sizeable tourism expenditures.

As a possible solution to the problems facing existing motorsport facilities on the Lower Mainland, the three principal operators of these facilities and the provincial government considered, in 1983, the development of a motorsport centre which would incorporate all of the local motorsport facilities in one location. The idea of a motorsport centre was considered as a practical solution since it would allow some sharing of common facilities such as parking areas, it would permit manpower and financial resources to be combined to develop the project, and it would require only one sizeable piece of land on a long-term basis to accommodate the facilities, instead of three individual properties.

To determine the likely configuration, operating characteristics and viability of such a complex for motorsport activity, the Government of British Columbia commissioned a "Preliminary Assessment" of the proposed "Lower Mainland Motorsport Centre" in 1983. This study was carried out by Novacorp Consulting Inc. of Vancouver. The study indicated clearly that there is strong demand for motorsport facilities, that motorsport is a major recreational pursuit on the Lower Mainland, that a complex could effectively combine the numerous facilities required and that it could sustain itself financially on an ongoing basis and likely pay back some of its capital costs as well. More specifically, the report states:

> "Preliminary indications show ...... that the operation of the centre will generate substantial levels of revenue and attract thousands of participants and spectators on a monthly basis. Furthermore, it is expected to satisfy the needs of thousands of people and many organizations in British Columbia who/which are involved directly or indirectly with this growing sport".

It concluded that "...the financial capability of the proposal, in combination with the recreational and social benefits which will be derived, indicate that the concept of a motorsport centre should be evaluated and planned in more detail".

While the "Preliminary Assessment" was being carried out, the motorsport groups themselves formed the PARA Motorsports Association to represent, under one organization, the thousands of motorsport enthusiasts on the Lower Mainland who participate through a wide variety of clubs and informal groups. Following completion of the study and mid-way through 1984, the British Columbia Association of Motorsport Facilities (B.C.A.M.F.) was organized to represent motorsport facilities and their operators and to guide the planning and development of the proposed motorsport centre. Directors of B.C.A.M.F. include representatives from LMORA, SCCBC, BCCCA, PARA and the Specialty Vehicle Association of B.C. (SVABC).

During 1984, B.C.A.M.F. and the Provincial Government decided to jointly commission a detailed investigation of the market for and economic benefits of a motorsport centre. Both the Provincial Government and B.C.A.M.F. recognize that such a study is necessary if the development process is to continue. The results of this work will be crucial in gaining the public and private sector support necessary for effective and timely planning, design and construction of the proposed motorsport centre.

STUDY OBJECTIVES

The objective of this study is to undertake a detailed market analysis and economic benefit assessment for the establishment and operation of a motorsport centre on the Lower Mainland. For purposes of this study, the general physical concept as described in the "Lower Mainland Motorsport Centre Preliminary Assessment" should be used. Specifically, the motorsport centre should include a drag strip, an oval track, a road course and an off-road course in one general area.

This is not intended to be a physical planning study. It should, however, provide details concerning expected users, participants and spectators and reliable data associated with motorsport activity on the Lower Mainland and the proposed motorsport centre.

STUDY PARAMETERS

The study shall be conducted in three phases:

- PHASE I - Data Assembly and Baseline Interpretation
- PHASE II - Market Analysis and Benefit Assessment of Motorsport Centre Operations and Economic Implications for the Motorsport Industry
- PHASE III - Conclusions and Recommendations

Important research, analysis and results to be included in each phase of the work are detailed below.

PHASE I - DATA ASSEMBLY AND BASELINE INTERPRETATION

1. Inventory of existing motorsport areas and facilities located on the Lower Mainland as well as motorsport facilities of comparable size elsewhere in Western Canada and the U.S. Pacific Northwest.

2. Expansion and/or development plans for motorsport facilities located within a three hour drive (+/-) of the Lower Mainland.

3. A review of current literature related to the motorsport industry and motorsport centre development, participant and spectator characteristics, market segmentation studies and economic analysis of motorsport area and facility development.

4. Attention should be paid to the history of all levels of government and their involvement in the development and marketing of motorsport areas and facilities. Concentration should occur in adjacent provinces and states. However, close attention should be paid to those motorsport areas and facilities which are operated in the public domain.

5. Three case studies of existing motorsport centres should be carried out to obtain information and data that can be used directly in analyzing the market for and the economic benefits associated with motorsport centre development on the Lower Mainland. The consultant is to suggest which centres will be investigated and the means to be used in obtaining the necessary data.

PHASE II - MARKET ANALYSIS, BENEFIT ASSESSMENT & ECONOMIC IMPLICATIONS

This phase should develop a demand and economic data base and perspective by which a better understanding of the intricacies of the motorsport industry can be achieved and by which effective short and long range planning for the future of the industry can be undertaken for the government and private sector alike.

1. Market and Demand Characteristics

Existing utilization, demand and market information should be collected and analyzed and projections of utilization of the proposed motorsport centre should be prepared covering a five-year period. This section should also develop a motorsport profile in British Columbia, both resident and non-resident. Data should be generated to quantify and qualify the supply and demand for motorsport and the subsequent relationship to facility and area development.

Specific types of information and data which should be included are summarized below.

- Utilization - length of season
  - days of operation
    - annual operation
    - special events
    - motorsport activities
  - motorsport - days (of participating members)
  - peak day utilization
  - other man-made facilities
  - year-round operations
  - utilization factor

$$UF\ (\%) = \frac{\text{Average peak utilization day} \times \text{average days of operation}}{\text{Average motorsport days/season}}$$

  - multi-event capacity
- Other Types of Use (e.g. Justice Institute of B.C., BCAA, professional driver's training, motorsport manufacturing, restaurant, lounge, accommodations, recreation amenities, museum, shopping, etc.)
  - likely involvement and interest
  - type and extent of utilization
  - additional facilities required
  - conflicts with motorsport utilization
- Resident Demand for Motorsport
  - number of British Columbians participating
  - classification of resident motorsport population
- Non-resident Demand for Motorsport
  - classification of non-resident motorsport participants utilizing British Columbia motorsport facilities

- Travel Patterns
  - major urban centres (e.g. Vancouver, Victoria, Kelowna, Prince George, Kamloops)
  - average distance travelled for day, weekend or vacation motorsporting
  - outside British Columbia travel patterns
- Motorsport participant and spectator expenditures
- Demand for facilities, services and aprés motorsport activities
- Demand for seasonal versus year-round facilities and activities at motorsport centres
- Visitor demographics

The market and demand analysis must conclude with detailed forecasts of activity at the proposed motorsport centre. This should include growth of both resident and non-resident motorsport participants and consideration of inflationary factors which may have positive or negative effects on demand or supply projections.

2. Economic Characteristics

Economic activity associated with motorsport is to be determined. This includes economic characteristics associated with motorsport events themselves as well as that sector of the economy that depends on motorsport activity for a major portion of its business.

Specific types of information and data which should be included are summarized below.

- Investment
  - gross fixed assets
  - total assets
- Financial Characteristics
  - ticket price
  - income and expense account
  - gross margin
  - debt/cash flow
  - pre-tax profit or loss
- Employment
  - direct and indirect employment resulting from motorsport events
  - direct and indirect employment associated with motorsport-related industry

- Tourism - levels and seasonality from motorsport events
  - expenditure estimates
- Characteristics of most profitable motorsport areas
  - by local, regional and destination classification
  - types of facilities and areas offered.

The economic information assembled should provide an accurate profile of motorsport activity on the Lower Mainland and an accurate profile of industry and business that depend on motorsport.

3. Economic Benefits of a Motorsport Centre

This component of the study should clearly determine the economic benefits associated with motorsport centre development. It must translate demand projections into economic implications and consider both economic advantages from motorsport events as well as economic advantages to motorsport related businesses and industry from development of such a centre.

Specific types of information and results which should be included are summarized below.

- Average area income statement and profitability
  - relationship to length of season
  - relationship to operating days
  - relationship to gross and fixed assets, total participant capacity per event
  - relationship to motorsport days
- Employment - direct and indirect employment generated by the motorsport centre
  - motorsport industry multiplier and economic indicators
- Investment - capital development
  - additional investment likely
  - sponsorship

- Tourism - increased tourism activity due to motorsport centre development

  - associated tourism expenditures

- Recreation - the enhancement of B.C.'s recreational base

  - opportunities for the pursuit of recreation by both residents and visitors

Economic benefits should be described clearly and the overall benefits associated with motorsport centre development and the resultant stimulation of motorsport related industry must be identified and measured.

4. Site Considerations to Maximize Economic Benefits

This part of the work should identify site related parameters which will effect both the marketability and the economic benefits associated with motorsport centre operation. Factors such as the following should be included:

- meteorlogical data;
- terrain characteristics;
- access and transportation facilities;
- environmental constraints;
- proximity and quantity of beds and restaurant seats;
- proximity of related industry;
- zoning (e.g. industrial vs. residential vs. recreational);
- urban growth in the local and regional setting; and
- industrial park development potential.

PHASE III - CONCLUSIONS AND RECOMMENDATIONS

The consultant must prepare specific conclusions and recommendations which result from the work undertaken. Specifically, conclusions and recommendations in the following areas are required:

- demand for and marketability of a motorsport centre;

- benefits to local residents, communities and businesses to be derived from motorsport centre development;

- benefits to British Columbia as a whole and the Provincial Government from motorsport centre development;

- relationship of motorsport centre development and operation to other land uses on the Lower Mainland;

- potential concerns and major issues focussing on development and marketing of motorsport in British Columbia;

- alternatives for development of the motorsport industry on the Lower Mainland; and

- economic implications for all levels of the government and the private sector.

The consultant will also be required to participate in a workshop with the Steering Committee following completion of the work. This workshop will involve discussions concerning the roles of government and the private sector in development and promotion of motorsport. The subjects of principal concern during this workshop will be as follows:

- Financing - equity participation
  - provision of loans and/or grants

- Taxation of Motorsport Centres

- Provision and Maintenance of Access Roads

- Development of Services Infrastructure
  - sewerage
  - water
  - telephone
  - power

- Promotion and Marketing
  - co-operatives
  - tour wholesalers
  - resident and non-resident marketing
  - multi-media advertising
  - equity participation
  - advertising (e.g. liquor, tobacco)

GEOGRAPHIC AREA OF STUDY

A specific site has not yet been selected for the proposed motorsport centre, although a number are under consideration. The consultant should not be concerned with the exact location of the motorsport centre at this stage. However, for the economic benefit work and marketability assessment, it should be assumed that the proposed motorsport centre will be easily accessed and located within the general geographic area bordered by the Strait of Georgia to the west and south, by the United States border to the south, by the Fraser River to the north and by Abbotsford to the east.

TIME FRAME AND REPORTING

The tentative start-up date is November 26, 1984 with the draft final report due 60 days later, or approximately January 26, 1984.

Report #1

Description of data deficiencies and the process by which the consultant expects to ameliorate the impact of these deficiencies. Due fourteen days after awarding of the contract.

Progress Meetings

Stipulated Progress meetings identifying status of the project, information analysis, and conceptual proposals to be called every fourteen days.

Draft Final Report

Describing all research results, the data base, analyses, conclusions and recommendations for review by the Steering Committee.

Final Report

Incorporating and addressing the concerns of the Steering Committee concerning the Draft Final Report.

TENDER PROPOSALS FROM CONSULTANTS

The Government of British Columbia (Ministry of Industry and Small Business Development), subject to the recommendations of the Technical Committee, will consider proposals from those individuals, partnerships, or firms which have had adequate experience in the field of tourism and motorsport planning, are currently technically competent to do the work, will have the personnel available when the work is scheduled to be performed, and who are financially capable of performing the work.

Proposals will be accepted from "Joint Ventures" which have the aforementioned qualifications and who are prepared to enter into a suitable joint venture agreement accepting joint and several responsibilities for the work.

Proposals should include evidence of the proposer's experience, competence and its financial capability.

Consultants proposals should include:

1. a detailed explanation of the steps and methodology for conducting the market and other studies (in phases);
2. identification of the areas not expected to be covered in the study;
3. a brief description of the background of the consulting firm, with emphasis on its experience in the area of Motorsport, Market Analysis and Economic Assessment;

4. a curriculum vitae for only those personnel selected to participate in the project, with emphasis on their experience in the area of Motorsport, Market Analysis and Economic Assessment;

5. a detailed cost estimate by phase illustrating the per diem rate for those individuals assigned to the various items of the consulting assignment; and

6. an outline of the project management system which will be in place to carry out the proposed assignment.

REPORTING STRUCTURE

The consultant(s) will report to a Technical Committee made up of representatives of the Motorsport Industry and the Provincial Government.

REPORTS AND WORKING PAPERS

1. The reporting procedure between the Technical Committee and the Consultant for progress reports on the study will be by written reports and meetings as specified elsewhere in this Proposal Call.

2. The final report will be requested one month from the date of acceptance of the draft report.

3. Eight copies of the Draft Final Report, and eight copies of the Final Report will be requested and all working papers will become the property of the government of British Columbia and the B.C.A.M.F. upon completion of the study. In addition, the consultant will provide one camera ready copy of all study documents as identified by the Technical Steering Committee.

BUDGET

A proposed budget of $35,000 has been suggested. Should your quotation be in excess of $35,000, please break out your costs in phases and the selected elements.

AGREEMENT

On behalf of the Government of British Columbia, the Ministry of Industry and Small Business Development will enter into contractual agreement(s) for the performance of the work. The consultant will be bound to keep confidential all information and relevant source material and all reports will become sole property of the Province of British Columbia. The Technical Committee reserves the right to recommend rejection of any or all proposals.

QUERIES

Queries should be directed to:

Manager
Community Projects Development
Community Economic Development Branch
Ministry of Industry and Small Business Development
5th Floor, 1405 Douglas Street
Victoria, British Columbia
V8W 3C1

Telephone: 387-4521 (604)

Appendix B

MOTORSPORT FACILITIES IN THE LOWER MAINLAND

APPENDIX B

MOTORSPORT FACILITIES IN THE LOWER MAINLAND

To provide the reader of this report with an understanding of existing physical facilities in the Lower Mainland, the appendix includes a summary description of each. Included are the principal constructed facilities as well as characteristics of each site and commentary on a number of parameters which effect the useability of each facility for motorsport purposes.

Much of the information included in this appendix was extracted from the "Lower Mainland Motorsport Facility Centre - Preliminary Assessment" report submitted by Novacorp Consulting Inc. in November, 1983. Additional comments are, however, included based on the research undertaken during this study.

A. ACTION RACEWAY/CAMPBELL VALLEY REGIONAL PARK

Action Raceway presently includes a 1/4 mile paved oval racetrack with supporting facilities (e.g. bleachers, concessions, pit area and picnic area) located in the 540 hectare Campbell Valley Regional Park. The track has leased twelve hectares of land for motorsport purposes from the Greater Vancouver Regional District (G.V.R.D.) in the past although renewal of this lease has been refused for the 1985 racing season.

The Regional Park is considered as a Nature Park and the G.V.R.D. feels that expansion of motorsport facilities is inconsistent with the park's objective of preserving nature. For this principal reason, motorsport activity in this location will not continue.

A summary of characteristics of Action Raceway and the suitability of the site motorsport activity is provided below.

- Location ... acceptable from most points of view
- Servicability .. hydro is available, potable water from wells is acceptable, and a sewer system is not likely.
- Physical Suitability . . while existing area is suitable for an oval track, it is insufficient to accommodate additional facilities.
- Visual Appeal .. excellent

- Surrounding Land Use .. increasing conflicts as residential development increases.
- Ease of Development .. not impossible and due jurisdictional, environmental and social acceptance.
- Climate ... average relative to other locations.
- Access ... average with some upgrading required for heavy traffic loads.
- Useability ... very restricted.

B. MISSION RACEWAY

This site comprises some 30 hectares on the banks of the Fraser River in Mission. It includes a sand drag strip, a motocross track and a number of ancillary facilities. The site and the improvements are owned by the B.C. Custom Car Association, the principal user of the existing facilities. Mission Raceway is located within the Fraser River floodplain and a dyke presently exists along the northern boundary.

In general, this property is reasonably well suited to its present purpose and has excellent areas. Zoned industrial, it is well away from potential residential development but some noise effects are reported to be felt in the downtown area. The entire site comprises only 32 hectares at the present time. Although some additional facilities could be developed on the property, it is not possible to construct the extensive new facilities at this location due to property size. Furthermore, although ownership and control of the site rests with a groupd interested in motorsport, rainfall statistics for Mission indicate that this is a major constraint to ongoing motorsport activity at this location.

A summary of the characteristics of the Mission Raceway and its suitability for motorsport activity is provided below.

- Location ... somewhat distant from, but acceptable relative to, principal user groups and spectator markets.
- Serviceability ... excellent .. fully serviced for gas, water, sewer and hydro.
- Physical Suitability ... site is acceptable for existing facilities but limited in expansion capability .. constructed facilities are, howeer, inadequate at the present time.

- Visual Appeal ... good .. especially with river frontage.
- Surrounding Land Use ... excellent since the site is surrounded by the Fraser River, the highway and industrial land.
- Ease of Development ... acceptable from the jurisdictional and environmental points of view.
- Climate ... poor since it has significant levels of rainfall.
- Access ... very good and being improved.
- Useability ... restrictive due to available land and presently inadequate facilities.

The above list indicates that the Mission Raceway site has some significant attributes and some significant deficiencies. The greatest constraint to ongoing motorsport activity is the fact that a paved drag strip, run-off area and return lane does not exist.

C. WESTWOOD MOTORSPORT PARK

This site encompasses a road race course and a go-kart track which is located on some 120 hectares of Crown land north of the Coquitlam town centre and immediately west of the Coquitlam River. The racetrack is approximately three kilometres north of the Lougheed Highway and is bounded on three sides by B.C. Hydro rights-of-way. Extensive gravel deposits occur immediately east of, and beneath the eastern portion, of the lease property. Furthermore, plans are in place to develop much of the Westwood Plateau for residential purposes.

The Westwood site is characterized by a number of major advantages, not the least of which is the established facilities and supporting infrastructure for road racin and go-kart racing. Westwood has been used for circuit racing since it opened in 1959. In addition, access to the site is good, and its location is reasonably close to principal user groups and spectator markets.

The Westwood site, however, is also characterized by a number of problems relating to its continued use and, indeed, its expansion. The Municipality of Coquitlam has plans for residential development on the Westwood Plateau. As a result, the current lease restricts major capital improvements on the property. It expired at the end of 1984 but was renewed for the 1985 racing season. As well, major gravel deposits are located beneath the eastern portion of the property. It is uncertain whether extraction will eventually take precedent over residential development on that portion of the property. It is likely, however, that either of these uses will preclude, or severely limit, on-going operation of the Westwood facility over the medium-term.

The topography of the property, in conjunction with the amount of land available, would cause difficulties for significantly expanded use for motorsport activity. Furthermore, immediate access and internal circulation need improvement and rainfall during the motorsport season is high. Presently, major events are constrained due to access, parking and pit area capacity; the inability to make necessary improvements due to future uncertainty; and the low propensity for sponsors to become heavily involved without long-term commitments.

A summary of the characteristics of Westwood Motorsport Park and suitability of the site to support motorsport activity is provided below.

- ► Location ... within relatively easy reach of principal user groups and spectator markets.
- ► Serviceability ... currently no trunk services are connected to the site, although they are located in the area.
- ► Physical Suitability ... suitable for some major motorsport uses, but potentially difficult to develop for others ... physical improvement required is currently restricted.
- ► Visual Appeal ... extremely attractive area for participants and spectators like.
- ► Surrounding Land Use ... not restrictive at the present time, although encroachment by residential development is beginning to the south.
- ► Ease of Development ... jurisdictional approval is likely the most severe constraint to development due to alternative uses for the site.
- ► Climate ... relatively poor with high rainfall and fog during the season.
- ► Access ... good access from most areas.
- ► Useability ... limited potential to upgrade and expand over the short to medium-term.

The above demonstrates, while Westwood Motorsport Park has served well as a motorsport facility in the past, that current operational and physical constraints as well as future uncertainty will prevent the site from continuing to be a major motorsport facility in the years ahead.

Appendix C

CONCEPTUAL PHYSICAL DESCRIPTION
OF
THE PROPOSED CENTRE

APPENDIX C

CONCEPTUAL PHYSICAL DESCRIPTION OF THE PROPOSED CENTRE

The appendix summarizes the major physical components of a suitable motorsport centre. As described in Chapter III of Volume I, the proposed centre would incorporate all existing motorsport facilities available in the Lower Mainland in one location. This strategy would allow common facilities to be shared to the extent possible, would enable long-term investment and motorsport facility security, would provide the potential for supporting organizations to combine resources to ensure a quality facility is developed, would maximize benefit derived and would minimize negative impacts associated with development.

Physical requirements of the proposed centre were evaluated during previous work. Information included in this appendix, therefore, has been extracted from the "Lower Mainland Motorsport Centre - Preliminary Assessment" report completed by Novacorp Consulting Inc. in November, 1983.

A. PHYSICAL FACILITY REQUIREMENTS

Organizations and groups who were interviewed during previous work mentioned above provided their opinions concerning the type of facilities which should be incorproated into a motorsport centre. Among the opinions expressed included such items as physical facilities which the groups would require as an organization to make us of the development.

A summary of the stated needs of potential users as determined during this previous work is summarized below:

- ► Race Tracks
  - road racing course;
  - oval race track;
  - drag strip;
  - off-road course.
- ► Miscellaneous Structures
  - timing/control towers;
  - meeting rooms;
  - garages/workshop areas.

- Miscellaneous Areas
  - parking;
  - paved area/skid pad;
  - unpaved display area;
  - picnic area;
  - campground/R.V. park.

A wide variety of smaller facilities and types of equipment were also indicated which would eventually be incorporated into a motorsport centre. Many of the items which were indicated as being required (e.g. washrooms, concessions, pit areas, etc.) were not listed separately during previous work undertaken but are considered to be important components of the motorsport centre.

A number of observations were made during the "Lower Mainland Motorsport Centre - Preliminary Assessment" concerning physical facilities at the proposed complex.

- While a road course, oval track, drag strip and an off-road course are mentioned by a variety of organizations, the specific characteristics of the required facility itself may vary. The road course and off-road course tend to be the most adaptable to user groups who will use these facilities. While the standard oval track is suitable fo rmost users, motorcyclists desire a hard pack, dirt oval, while go-kart enthusiasts require a smaller facility. Similarly, most user groups require a paved drag strip but dirt or sand drags are popular as well.

- The smaller motorsport groups and organizations tend to incorporate family and social activity with their motorsport interests. Club meetings and events for these organizations, therefore, have been associated clearly with such facilities as meeting rooms, picnic areas, campgrounds and open space.

- Many of the smaller motorsport groups and organizations are interested more in non-racing events such as auto displays, concours and swap meets than in racing events. This type of use needs to be accounted for the motorsport centre. It is a popular requirement and non-racetrack area use can occur independently of race track utilization by other groups.

- Non-motorsport recreation groups interviewed exhibit specialized requirements. While these requirements may be met at the motorsport centre, separate facilities will be needed to do so.

- Non-recreation user groups tend to have much more in common with motorsport users than does the non-motorsport recreation component. This is due to the fact that the activities of these organizations, which could impact on the proposed facilities, are vehicle oriented. The extent to which these users can be accommodated will strongly add to overall utilization of the centre, since their demands tend to be year round instead of seasonal.

Provision for developing all major and important facilities needs to be incorporated into detailed planning for the proposed motorsport centre. Research has shown that it is especially important for competitive racing facilities to be carefully designed to the specifications of major sanctioning organizations and for the entire development to be high in quality and to provide important amenities for spectators and participants.

B. MOTORSPORT CENTRE SITE REQUIREMENTS

Prevous work has indicated that, from the physical point of view, the site selected for motorsport centre development must meet certain criteria. These conditions arise primarily from the types of uses that the site is expected to accommodate based on the requirements identified.

While site requirements listed herein are preliminary, it is appropriate to describe the principal physical features that should be accommodated. Again, these site requirements were extracted from the "Lower Mainland Motorsport Centre - Preliminary Assessment" report.

In order to maximize land-use on the selected strip, the following major facilities were identified as required components of the overall project:

- a road race course ... of approximately four kilometres in length;
- an oval track ... of approximately 600 metres (3/8 mile) in length with potential expansion to approximately 800 metres (1/2 mile);
- a drag strip ... of approximately 1200 metres (3/4 mile) in length including the drag run-off area;
- an off-road course ... which can vary in length but which will require an area of from ten to fifty acres depending on the utilization expected; and
- parking areas ... for the above facilities providing for a total capacity of 7,000 to 12,000 vehicles during peak periods in segregated areas.

This study has identified the need to incorporate a motocross track and a go-kart track into the overall motorsport centre as well.

A number of other physical requirements which consume considerable land (e.g. campground area or R.V. sites) were not ignored during this previous work. Rather, the basic motorsport facilities described above are considered to be of primary importance during site selection and layout. Additional requirements, would need to be accommodated to the extent practical and possible, once detailed planning work is undertaken.

Based on previous physical research undertaken, the following site evaluation considerations were identified in addition to those listed above:

- a varying terrain without severe topography is ideal for a road course development;
- a long level area is required for drag strip development;
- surrounding hills to provide good vantage points for spectators at all facilities would be desirable;
- separate accessibility and parking area by facility is desirable in order to segregate events;
- parking areas should be located as close as possible to the facility for which they are used;
- the site should be significantly separated from existing or future residential development;
- the site should be reasonably accessible from all parts of the Lower Mainland;
- sufficient land in the range of 120 to 170 hectares should be available to accommodate the development of required facilities; and
- supporting infrastructure such as hotels, motels and restaurants should be encouraged to develop adjacent to and within a reasonable distance of the site.

These and other considerations are elaborated on further in the report identified above. They represent, however, principal requirements of the potential user groups of a motorsport centre and this study was carried out on the basis that a development of this scope and with these physical features would be constructed.

Appendix D

MOTORSPORT FACILITY CASE STUDIES

Appendix D

MOTORSPORT FACILITY CASE STUDIES

During the study, research was undertaken into the operations of three separate motorsport facilities in North America:

- Laguna Seca Raceway.
- Mosport Motorsport Park.
- Portland International Raceway.

Interviews were held with representatives for each of these facilities. The extent and type of information collected in each case varied. Important results of this research are included in this appendix. Specific activity volumes which were used during the study for comparison purposes are included in appropriate sections of the main report.

A. LAGUNA SECA RACEWAY

Laguna Seca comprises a road race circuit and is located in Monterey, California.

1. Annual events

There are five promoted events at Laguna Seca Raceway each year. These are limited in number by a use permit from the Monterey County Board of Supervisors. The events include the IMSA Camel GT Series and related races, the first Sunday in May; the Summer Sprints, featuring a Sports Car Club of America Divisional Championship and a pair of main events (which the last two years have been Renault Cup and Formula Atlantic racing) each June; the Champion Spark Plug 200, part of the Camel Pro Series National Championship motorcycle series in July; the Monterey Historic Automobile Races in August and finally the Monterey Grand Prix in October, which for the past two seasons has featured CART and the PPG Indy Car World Series.

2. The relationship between Laguna Seca, the County and SCRAMP

The Sports Car Racing Association of the Monterey Peninsula (SCRAMP) is made up of a group of area people who devote thousands of hours each year in the production of the five promoted events at Laguna Seca Raceway. They enlist the help of area charity and civic organizations for the manpower needed to stage the races. At the end of the season, the net proceeds from the five promoted events are divided among the various charities. A small paid staff works with the Directors of SCRAMP in the day-to-day office operation and facility upkeep. Laguna Seca Raceway is located in the centre of a park, owned by the County of Monterey, and staffed by Monterey County Parks Department personnel. In the most simple terms, the County is a landlord, SCRAMP is a tenant and Laguna Seca Raceway is the "rental property."

3. Demographics of spectator attendance by event

The IMSA and Indy Car races draw about the same audience -- 78% male, 18 to 34 years of age, most with some college or a degree and an average income of $25,000.00 or more. The Historic draws a somewhat older and more affluent crowd. The motorcycle race draws from a wider age base -- 16 to 54. The basic drawing area is 10 Northern California markets, although for the motorcycle race, there is a substantial percentage (25%) who are from Southern California.

4. Activities other than automobile racing that take place at Laguna Seca

Camping year-around, concerts, festivals and other activities are held within the park under the jurisdiction of the Monterey County Parks Department. These activities contribute to the overall success of the park, but they do not provide the financial impact and support that SCRAMP provides with its five promoted events.

5. Effect of the facility on the local economy

Studies by the Parks Department have indicated that the promoted events by SCRAMP bring into the Monterey Peninsula some $10 million each year.

6. Effect of the race facility on local jobs

Combined spending by visitors, the Monterey County Parks Department and SCRAMP in the local economy is nearly $30 million annually.

7. Effect of the national economy upon race attendance at race events

The general revenues have increased dramatically over the last 5-6 years, indicating that there is no direct relationship with the national economy, which has had serious ups and downs in the same period.

8. Operating relationship between all the entities involved, including military, at the raceway

Most have been explained above. Laguna Seca used to be on Fort Ord property, until deeded to the County of Monterey. However, two of the main roads are on the military property, and there is arranged a "use agreement" with the Army permitting their use for the main events.

B. MOSPORT MOTORSPORT PARK

Mosport Park Limited is a public company which operates a motorsport centre located east of Toronto in Bowmanville. Individuals involved in operating and managing the facility undertake all responsibility for events including organization and promotion. The operation went public in 1972. Presently 35% of the shares are held by the management facility.

1. Major event attendance

The following table outlines approximate spectator volume over the past four years for Mosport's three major international auto races held annually. In addition to smaller events which draw in the range of 20,000 spectators. These include the traditional season-opening Victoria Day Sprints for cars and motorcycles.

	June	August	September
1984	64,000	71,000	66,000
1983	74,000	70,000	69,000
1982	64,000	65,000	68,000
1981	61,000	59,000	72,000

2. Schedule of events

Major events planned for the 1985 season at Mosport Motorsport Park are summarized and described below:

- Victoria Day Sprints (May 18/19/20)

  Traditional season opening weekend for cars and motorcycles featuring motorcycles finals on Monday.

- Budweiser Can-Am (May 31/June 1/2)

  Featured event in the CRC Chemicals Can-Am Challenge plus suporting events for the Canadian Tire Formula 2000 racing cars, Honda/Michelin Challenge and Historic and Vintage racing machines.

- Vintage Festival (June 21/22/23)

  Weekend of Vintage auto racing.

- President's Trophy Races (June 29/30/July 1)

  CASC National Club races plus Canadian Tire Formula 2000 racing cars and Honda/Michelin Challenge events.

- Budweiser GT (August 9/10/11)

  Features a six-hour World Cahmpionship Endurance racing event plus supporting races in the Canadian Tire Formula 2000 and Honda/Michelin Challenge series.

- Budweiser Can-Am/Trans-Am Speed Week (Sept. 6-15)

  Featuring the SCCA Trans-Am series September 6, 7, 8 and the Budweiser Can-Am September 13, 14, 15 plus supporting events including SCCA Sports 2000 and Sports Renault, Canadian Tire Formula 2000 and Honda/Michelin Challenge series races.

3. Company financial characteristics

The following pages include financial statements for Mosport Park Limited as extracted from the firm's annual report for 1984.

MOSPORT PARK CORPORATION

Consolidated balance sheet

ASSETS

	September 30 1984	December 31 1983
Current assets:		
Cash	**$ 232,308**	$ —
Term deposits	**912,555**	100,000
Accounts receivable	**210,755**	5,149
Current portion of notes receivable (Note 3)	**1,879,272**	549,450
Due from related parties	**—**	104,171
	3,234,890	758,770
Notes receivable (Note 3)	**6,337,886**	7,043,944
Marketable securities, at cost (market value - $540,043; 1983 - $114,857)	**472,850**	76,000
Fixed assets (Note 4)	**1,362,248**	1,348,128
Other assets	**49**	49
	$11,407,923	$9,226,891

Approved by the Board

H.M. Hudes Director

B.J. Kamin Director

LIABILITIES

	September 30 1984	December 31 1983
Current liabilities:		
Bank indebtedness (Note 5)	**$ 14,174**	$ 115,934
Accounts payable and accrued liabilities	**600,606**	369,542
Due to related parties	**4,277**	—
Current portion of long-term debt (Note 6)	**496,751**	40,550
Income taxes payable	**7,963**	57,249
Deferred income taxes	**640,000**	248,000
	1,763,771	831,275
Due to Canadian Racing Drivers Association (Note 8)	**—**	140,432
Long-term debt (Note 5)	**650,000**	485,671
Deferred net film revenue (Note 7)	**597,352**	444,752
Deferred income taxes	**2,593,000**	2,491,000
	5,604,123	4,393,130

Contingency (Note 9)

SHAREHOLDERS' EQUITY

Share Capital (Note 8):		
Authorized -		
5,000,00 common shares without par value		
Issued -		
1,995,052 common shares (1983 - 1,732,505)	**2,154,832**	1,614,400
Retained earnings	**3,648,968**	3,219,361
	5,803,800	4,833,761
	$11,407,923	$9,226,891

To the Shareholders of
Mosport Park Corporation:

We have examined the consolidated balance sheet of Mosport Park Corporation as at September 30, 1984 and the consolidated statements of income, retained earnings and changes in financial position for the nine months then ended. Our examination was made in accordance with generally accepted auditing standards, and accordingly included such tests and other procedures as we considered necessary in the circumstances.

In our opinion, these consolidated financial statements present fairly the financial position of the Company as at September 30, 1984 and the results of its operations and the changes in its financial position for the nine months then ended in accordance with generally accepted accounting principles applied on a basis consistent with that of the preceding year.

Price Waterhouse
Chartered Accountants

Toronto, Ontario
November 30, 1984

MOSPORT PARK CORPORATION

Consolidated Statement of Income

	Nine months ended September 30 1984	Year ended December 31 1983
Revenue:		
Track operations	$1,756,715	$1,649,019
Interest income	489,055	721,863
Present value allowances	178,463	253,114
Gain on sale of marketable securities	15,670	—
Other	633	—
	2,440,536	2,623,996
Expenses:		
Track operations	586,246	603,897
General and administration	1,215,739	976,094
Bad debts	(404,874)	742,477
Write-off of other assets	—	87,041
Interest on long-term debt	57,268	79,654
Depreciation	31,445	43,669
Loss on sale of marketable securities	—	21,200
Other interest	30,505	16,456
	1,516,329	2,570,488
Income before income taxes and extraordinary item	924,207	53,508
Provision for (recovery of) income taxes:		
Current	104,100	46,000
Deferred	494,000	(18,000)
	598,100	28,000
Income before extraordinary item	326,107	25,508
Extraordinary item:		
Reduction in income taxes due to the application of prior years' losses	103,500	43,000
Net income for the period	$ 429,607	$ 68,508
Earnings per share before extraordinary item	$.16	$.01
Net earnings per share	$.22	$.04

CONSOLIDATED STATEMENT OF RETAINED EARNINGS

	Nine months ended September 30 1984	Year ended December 31 1983
Balance, beginning of period	$3,219,361	3,150,853
Net income for the period	429,607	68,508
Balance, end of period	$3,648,968	$3,219,361

MOSPORT PARK CORPORATION

Consolidated statement of changes in financial position

	Nine months ended September 30 1984	Year ended December 31 1983
Funds provided by (used in) operations:		
Income before extraordinary item	$ 326,107	$ 25,508
Items not affecting working capital -		
Depreciation	31,445	43,669
(Gain) loss on sale of marketable securities	(15,670)	21,200
Write-off of other assets	—	87,041
Deferred income taxes	494,000	(18,000)
Funds provided by (used in) operations	835,882	159,418
Extraordinary item -		
Reduction in income taxes due to the application of prior years' losses	103,500	43,000
	939,382	202,418
Sources of working capital:		
Increase in deferred film revenue	152,600	—
Increase in due to Canadian Racing Drivers Association	—	21,328
Proceeds from sale of marketable securities	18,820	39,652
Issue of 262,547 common shares	540,432	—
Debenture proceeds	650,000	—
Decrease in long-term notes receivable	706,058	193,515
	3,007,292	456,913
Application of working capital:		
Reduction of notes payable to shareholders	—	20,000
Decrease in due to Canadian Racing Drivers Association	140,432	—
Reduction in long-term debt	485,671	15,550
Purchase of marketable securities	400,000	24,000
Increase in current portion of deferred income taxes	392,000	200,000
Purchase of fixed assets	45,565	—
	1,463,668	259,550
Increase in working capital	1,543,624	197,363
Working capital (deficiency), beginning of period	(72,505)	(269,868)
Working capital (deficiency), end of period	$1,471,119	$(72,505)
Represented by:		
Current assets	$3,234,890	$758,770
Current liabilities	1,763,771	831,275
	$1,471,119	$(72,505)

C. PORTLAND INTERNATIONAL RACEWAY

Portland International Raceway is operated under the Parks and Recreation Department of the City of Portland. Facilities include a road racing course, a drag strip incorporated into the road course and an off-road course.

1. Motorsport centre revenue

Discussions held concerning revenue generating potential of motorsport led to the following observations concerning Portland International Raceway.

- Advertising revenue currently totals about $10,000 annually but is expected to grow to levels approaching $70,000.
- The major CART event held in 1894 was promoted and organized by the Rose Festival Association. PIR received approximately $10,000 in lease revenue for the race and generated about $30,000 from concession rental.
- A new bridge is now being constructed at the facility by the Rose Festival Associaiton. The Association is floating a loan to construct this facility based on committed contributions from B.F. Goodrich totaling about $250,000 over the next five years. The bridge itself is expected, eventually, to generate approximately $20,000 to $25,000 per year for the motorsport park from advertising revenue.
- Facility management indicated that the greatest revenue generating potential exists from rental of the track during non-motorsport days.
- Facility management indicated that advertising revenue represents a key income source for the future.
- Financial records provide the following breakdown of revenue for the twelve month period ending June 30, 1984.
    - Total attendance -- 142,023 (up 53% from the previous year).
    - Gross gate revenue -- $1.42 million.
    - Rental income -- $87,427.
    - Gross concession revenue -- $233,963.
    - Other revenue -- $87,786.

2. 1984 CART Race

Discussions concerning this major event held in 1984 led to the following observations.

- The event generated about $5 million in first round spending in the City of Portland.
- The Chamber of Commerce estimates concerning total economic impact, including indirect and induced effects, range up to $15 million.
- A committment of approximately $500,000 was required by the Rose Festival Association to secure the event.
- About 70,000 day tickets were sold for the three-day event.
- The Rose Festival Association made about $250,000 on the event.

Appendix E

MARKET RESEARCH OF LOWER MAINLAND RESIDENTS

This appendix includes the self contained results of market research undertaken by Canadian Facts during the study.

LOWER MAINLAND MOTORSPORT CENTRE - GENERAL PUBLIC SURVEY OF LOWER MAINLAND RESIDENTS

January 1985

RJ405/MCS

Prepared by
Canadian Facts

Presented to:

THORNE STEVENSON KELLOGG ON
BEHALF OF MINISTRY OF INDUSTRY
AND SMALL BUSINESS DEVELOPMENT

Canadian Facts
1112 W. Pender Street
5th Floor
Vancouver, B.C. V6E 2S1
(604) 669-3344

Canadian Facts, a division of SK/CF Inc

ORDER OF CONTENTS

Page

FOREWORD F-1

SUMMARY OF FINDINGS 1

A. GENERAL MOTORSPORT INVOLVEMENT 1

B. INVOLVEMENT IN SPECIFIC MOTORSPORT EVENTS 2

C. CHARACTERISTICS OF MOTORSPORT ATTENDANCE 5

D. PREFERENCES FOR MOTORSPORT EVENTS 7

E. FACTORS IMPORTANT IN EVENT ATTENDANCE 8

F. INTEREST IN A LOWER MAINLAND MOTORSPORT COMPLEX 9

TECHNICAL APPENDIX A-1

APPENDIX
THE QUESTIONNAIRE

FOREWORD

Background

Thorne Stevenson Kellogg, principal contractor to the Lower Mainland Motorsport Center - Market and Economic Analysis study, invited Canadian Facts to the Consulting Team assembled for the study. As detailed in the Proposed Consulting Program prepared by Thorne Stevenson Kellogg in November of 1984, a need was identified to conduct original research into the participation rates, interests, and characteristics of Lower Mainland residents who have some demonstrated interest in motorsport events.

The results of this public opinion survey will be integrated with other data gathered such as industry, social and environmental research. It is within the overall context of this market and economic study that the following market research project was undertaken.

Objectives

Within the broader project objectives, the market research objectives were:

- To identify the overall incidence of participation and interest in both competitive and non-competitive motorsport events in the Lower Mainland of B.C.

- To measure the frequency of involvement, travel patterns, expenditures, spectator characteristics and so forth based on the last event attended by residents.

- To evaluate initial public response to the concept of a Lower Mainland Motorsport facility.

Methodology

A total of 267 interviews were conducted (January 4 to 11, 1985) with a cross-sectional sample of Lower Mainland residents aged 18 years of age or older. The source of the sample was current telephone directories for a calling area from Vancouver east, up to, but not including, Hope.

All calling was conducted from Canadian Facts' Central Location facility - located in Vancouver where it is supervised and monitored. Prior to finalization of the questionnaire employed in this survey, a pre-test was conducted resulting in minor adjustments to the document.

The base sample was drawn in two replicate blocks and up to a total of three calls were placed in order to obtain a completed interview. A hand tabulation following the exhaustion of the first sample block indicated that the incidence of residents who had watched or participated in any motorsport events in the past two years was 18% of adults (18 years or older). Having established the incidence rate from these initial interviews, calling continued creating an oversample which resulted in a total of 99 residents who had had some involvement and/or interest in motorsport events. These 99 people were interviewed at length regarding their activities, whereas the remaining 168 respondents participated in a shorter interview.

The demographic characteristics of both sample groups were recorded to facilitate an analysis of variance.

Finally, the data was weighted prior to data processing in order to reflect the known relative proportions of responses from residents who were interested and uninterested in motorsports. The effects of the weighting scheme are detailed in the Technical Appendix.

Results Presentation

The results of this study are presented in the form of a Summary Of Findings and Detailed Computer Tables. A description of the weighting scheme employed in the data processing is contained in the Technical Appendix. The questionnaire used in this survey is also appended.

It should be noted that data such as is presented in this study, obtained from sample populations, is subject to a degree of variance. In order not to imply an unwarranted degree of precision, all percentage figures in the Summary have been rounded to whole numbers, and thus may not always total 100%.

Throughout the Summary, circles have been used to denote statistically significant unusually high figures, and squares denote unusually low figures, at the 90% confidence level.

Further, it should be noted that percentages derived from "actual" bases of less than 100 should be interpreted with caution, while percentages derived from "actual" bases of less than 50 should be interpreted with extreme caution.

January 1985

CANADIAN FACTS

SUMMARY OF FINDINGS

SUMMARY OF FINDINGS

A. GENERAL MOTORSPORT INVOLVEMENT

The majority of Lower Mainland residents have not been involved in motorsports in the past. Most of those who have watched or participated in some form of motorsport activity are: males (49%), from younger age groups (age 18 to 34 years - 52%), and single (54%). In total, 18% of Lower Mainland residents had either attended or watched some motorsport event in the past 2 years.

Among those who have never been involved with motorsports, 82% state they would be not very or not at all interested in becoming a future spectator or participant. The remaining 18% of residents might represent a potential market which could be cultivated to a future motorsport complex. This group tended to come from younger, single, higher income ($30,000 or more per annum) households. (See Detailed Tables, Pages 1 And 2)

Virtually all (91%) of those who had had some involvement with motorsports in the past two years had watched some motorsport event on television. About one-half of the younger (18 to 34 years) single males had attended a motorsport event in person in the past two years. Only 8 to 10% of residents were found to be motorsport participants. (See Detailed Tables, Page 3)

B. INVOLVEMENT IN SPECIFIC MOTORSPORT EVENTS

A wide variety of competitive motorsport events are available on television. Road racing and oval racing appear to be events which attract the largest proportion of T.V. spectators. Drag racing, along with motorcycle racing and motocross events are the second most popular events on T.V.

Just as viewership of individual motorsport events is dependent on the frequency and availability of televised programs, so too the likelihood of having attended a given event in the past two years is a function of where and how often that event was staged. Even so, demolition derbies and tractor pull events are two popular spectator events in the Lower Mainland. A significant proportion of residents are likely to have attended one of these two events on the last occasion they attended a motorsport event in person. Road and oval racing take the second position in terms of popular events attended in the past two years. Four wheel drive events also are popular in this area.

	Percent Of Respondents Who ...		
	Watched On T.V.	Attended In Past 2 Years	Last Event Attended
Total - Weighted	(205)	(99)	(99)
	%	%	%
Motorsport Event:			
Auto Racing On A Road Course	88	30	8
Oval Track Racing	72	31	13
Drag Racing	59	20	9
Motorcycle Racing	53	26	5
Motocross	51	25	5
Demolition Derbies	42	45	18
Motor Boat Racing	38	6	2
4-Wheeler Drive Event	26	28	12
Hill Climb Race	25	5	0
Tractor Pulls	24	41	28
Road Rally	20	5	2

(See Detailed Tables, Pages 4 To 6)

Although it generally appears as though the motorsport attendees and participants are predominantly male, interest in watching motorsport events on television was expressed by about one-half of the female residents. In television viewing significant differences (preferences) emerged between males and females. For example, more males like watching motorcycle racing, motor boat racing, four wheeler events, or hill climb races, than do females. The most popular T.V. motorsports among females are road races and oval track races. Also it appears that females enjoy attending demolition derbies. In addition, drag racing may find a large following particularly among the younger spectators (age 18 to 34 years).

Some correlations may be present between events watched on T.V. and events attended in the past two years. For example, those who watch road and drag racing on T.V. also attend road and drag races as well as motorcycle races, whereas T.V. spectators of oval track racing have attended road races, oval races, demolition derbies and motocross events. Television motocross fans have attend motocross events as well as motorcycle races. (See Detailed Tables, Pages 4 To 8)

C. CHARACTERISTICS OF MOTORSPORT ATTENDANCE

About one-fifth of respondents stated that the last event they attended occurred less than six months ago. Over one-third had been to an event within the past year, and another one-third of respondents had not been to a motorsport event in the past year.

Almost one-half (47%) of motorsport attendees went to an event held in Vancouver City on their last occasion. Four other locations were last visited by 8 to 10% of attendees:

1. Coquitlam
2. Langley
3. Washington State
4. Mission/Agassiz

Modes of transportation used to get to the last event attended were: cars (77%), trucks (9%) or motorcycles (6%). Three percent of attendees walked or took the bus to the last event they attended.

The average travel time (by road) to the last event attended was about 56 minutes.

The majority (65%) of attendees went to their last motorsport event with friends, 23% went with family members and 6% went alone. More younger, single males went to motorsport events with friends, than did females who tended to go to motorsport events with the family. Groups of two or four people comprise common party sizes with the average being 3.87 people per party.

The majority (61%) of attendees stayed just a half-day at the last motorsport event they attended. One-third stayed for a full day, and 9% went to events lasting 2 or 3 days.

The amounts spent at the last motorsport event varied by age groups but overall the total average dollar amount spent was $65.88 per party. Those aged 18 to 34 years averaged expenditures of $73.31 per party whereas those aged 35 to 54 spend just $38.40 per party. It is important to note that the majority of attendees spent less than $60.00 but 25% of resident groups spent between $61.00 and $100.00 at the last motorsport event attended. (See Detailed Tables, Pages 10 To 18)

D. PREFERENCES FOR MOTORSPORT EVENTS

The five top events cited as favourites by residents are:

1. Road Racing
2. Drag Racing
3. Motocross
4. Oval Track Racing
5. Tractor Pulls/Demolition Derbies/or Four Wheel Drive Events

Non-competitive events attended or participated in are:

1. Auto Shows
2. Custom Car Shows
3. Parades

In terms of existing Lower Mainland facilities that residents have been to, the following list indicates past two years' attendances:

Total - Weighted	Residents (100) %
1. Westwood Park	52
2. Mission Raceway	46
3. Action Raceway	32
4. Kent Raceway	24
5. B.C. Place/P.N.E.	24

E. FACTORS IMPORTANT IN EVENT ATTENDANCE

Residents who had attended or participated in a motorsport event in the past two years were asked to rate, on a scale of 1 to 5, how important a list of factors were to their decision of whether to attend a given motorsport event or not. (Scale used: 1 = Not At All Important and 5 = Very Important.)

The admission price and the location of the event were the two most important factors in the minds of residents. That the event be held each year and feature well known drivers and teams were also considered important. The least important consideration is that the event be locally sponsored.

Decision Factors:	Average "Importance" Rating Given To Each Factor:
Admission Price Be Comparable To Movie Or Similar Entertainment	4.03
Event Be Close To Residence For Day Trip	4.00
Event Be Held Each Year	3.47
Event Feature Well Known Drivers And Teams	3.39
Event Be In A World Class Facility	3.09
Event Be Of National Calibre	3.03
Event Be Locally Sponsored	2.89

F. INTEREST IN A LOWER MAINLAND MOTORSPORT COMPLEX

Overall, 41% of total residents surveyed would be very or somewhat likely to attend an event held in the proposed motorsport facility. Those most likely to attend such a facility are male, younger (age 19 to 34 years), single and residing outside of the Vancouver City core.

Including residents who have not had any involvement with motorsport events in the past two years, the average number of times residents would go to events represents about 13% of occasions (or 2.61 times out of 20 occasions). Residents who have attended or participated in motorsport events in the past two years would attend a Lower Mainland facility as described on an average of 22% of occasions (4.35 times out of 20 possible occasions). (See Detailed Tables, Page 31)

In terms of competitive events residents would like to see in such a facility, drag racing (20%), oval track racing (16%), motorcycle racing (13%) and motocross (13%) were the four events mentioned most often. Non-competitive events mentioned for the facility were car shows (14%), a custom car show (11%) and antique or classic car show (11%). (See Detailed Tables, Pages 29 And 30)

Among those residents who had recently (within the past two years) been involved in some motorsport activities, the list of competitive events desired for a Lower Mainland facility was as follows:

		% Of Mentions
1.	Motocross	47
2.	Drag Racing	43
3.	Oval Track Racing	38
4.	Four Wheel Drive Events	28
5.	Road Race/Grand Prix	25
6.	Motorcycle Racing	23

APPENDIX

TECHNICAL APPENDIX

Weighting of this data was done in two stages. In the first stage a gross weight was applied in order to downweight the 99 interviews completed with residents who had attended or participated in motorsport events in the past two years so that these respondents would constitute 18% of the total data base.

Number Of Interviews:		Motorsport Involved	Not Involved In Motorsports
Actual	267	99	168
Weighted	555	100	455

The second stage of weighting accounted for the probability of selection from within the household.

DETAILED TABLES

EXPLANATION OF NOTATIONS USED IN THE DETAILED TABLES

*	Percent $<$ .05
-	Percent = 0

NOTES: Percentages derived from "actual" bases of less than 100 should be interpreted with caution.

Percentages derived from "actual" bases of less than 50 should be interpreted with extreme caution.

Items listed below any sub-total may not exactly add to the sub-total through computer "rounding" (applies to (1) weighted frequencies where decimal not shown or (2) where percent shown without decimal).

STANDARD DEVIATION

The Standard Deviation is calculated by taking the square root of the variance around the mean. It is a summary statistic of variation printed below the mean. The Standard Deviation gives an idea of the likely variation around the mean if we are simply considering the mean as a descriptive statistic. When Standard Deviation scores are small relative to the means, means can be taken as good representations of the individual scores.

STANDARD ERROR

The Standard Error is calculated by dividing the Standard Deviation by the square root of the sample size. The Standard Error indicates the likely deviations that can be expected, and therefore the confidence limits.

For example, mean ± 2 standard errors will include the "true mean" 95% of the time.

RJ405 CANADIAN FACTS

PAGE	TABLE	TITLE	BASE
1	1	Q. 1 WHETHER EVER WATCHED OR PARTICIPATED IN MOTORSPORT RELATED EVENTS.	TOTAL RESPONDENTS
2	2	Q 2 LEVEL OF INTEREST IN WATCHING OR PARTICIPATING IN MOTORSPORTS, CAR	TOTAL RESPONDENTS WHO HAVE NEVER
3	3	Q. 3 WHETHER HAVE WATCHED OR PARTICIPATED IN MOTORSPORTS, CAR RACING OR	TOTAL RESPONDENTS WHO HAVE WATCHED OR
4	4	Q 4A MOTORSPORT EVENTS WATCHED ON T V IN PAST TWO YEARS	TOTAL RESPONDENTS WHO HAVE SEEN A MOTORSPORT EVENT ON T V
5	5	Q 4B MOTORSPORT EVENTS ATTENDED IN PAST TWO YEARS	TOTAL RESPONDENTS WHO HAVE ATTENDED A MOTORSPORT EVENT
6	6	Q. 4C LAST MOTORSPORT EVENT ATTENDED IN PERSON	TOTAL RESPONDENTS WHO HAVE ATTENDED A MOTORSPORT EVENT
7	7	Q. 4D MOTORSPORT EVENTS PARTICIPATED IN DURING PAST TWO YEARS	TOTAL RESPONDENTS WHO HAVE PARTICIPATED IN A MOTORSPORT EVENT
8	8	Q. 4E MOTORSPORT EVENTS PARTICIPATED IN ON A REGULAR BASIS	TOTAL RESPONDENTS WHO HAVE PARTICIPATED IN A MOTORSPORT EVENT
9	9	Q. 5 WHETHER A SPECTATOR OR PARTICIPANT IN LAST MOTORSPORT EVENT ATTENDED	TOTAL RESPONDENTS WHO HAVE SEEN OR
10	10	Q. 6 WHEN ATTENDED LAST MOTORSPORT EVENT	TOTAL RESPONDENTS WHO HAVE SEEN OR
11	11	Q. 7 LOCATION OF LAST MOTORSPORT EVENT ATTENDED	TOTAL RESPONDENTS WHO HAVE SEEN OR
12	12	Q. 8A TYPE OF TRANSPORTATION USED TO ATTEND EVENT	TOTAL RESPONDENTS WHO HAVE SEEN OR
13	13	Q. 8B APPROXIMATE TRAVEL TIME BY ROAD FROM HOME TO LAST EVENT ATTENDED	TOTAL RESPONDENTS WHO TRAVELLED BY ROAD TO LAST EVENT ATTENDED
14	14	Q. 9 WHO ATTENDED LAST EVENT WITH	TOTAL RESPONDENTS WHO HAVE SEEN OR
15	15	Q. 10 TOTAL NUMBER OF PERSONS ATTENDED LAST EVENT WITH	TOTAL RESPONDENTS WHO HAVE SEEN OR

RJ405 CANADIAN FACTS

PAGE	TABLE	TITLE	BASE
16	16	Q. 11A LENGTH OF TIME OF LAST EVENT	TOTAL RESPONDENTS WHO HAVE SEEN OR
17	17	Q 11B LENGTH OF TIME STAYED AT LAST EVENT	TOTAL RESPONDENTS WHO HAVE SEEN OR
18	18	Q. 12 APPROXIMATE TOTAL DOLLAR AMOUNT SPENT AT LAST EVENT	TOTAL RESPONDENTS WHO HAVE SEEN OR
19	19	Q. 13 FAVOURITE COMPETITIVE MOTORSPORT EVENT	TOTAL RESPONDENTS WHO HAVE SEEN OR
20	20	Q. 14A NON-COMPETITIVE MOTORSPORT EVENTS ATTENDED AS A PARTICIPANT OR	TOTAL RESPONDENTS WHO HAVE SEEN OR
21	21	Q. 14B LAST NON-COMPETITIVE MOTORSPORT EVENT ATTENDED	TOTAL RESPONDENTS WHO HAVE SEEN OR
22	22	Q. 15 MOTORSPORT FACILITIES IN THE LOWER MAINLAND EVER VISITED	TOTAL RESPONDENTS WHO HAVE SEEN OR
23	23	Q. 16 IMPORTANCE OF FACTORS WHEN DECIDING WHETHER TO ATTEND A MOTORSPORT	TOTAL RESPONDENTS WHO HAVE SEEN OR
27	24	Q. 17 NUMBER OF OTHER PERSONS IN HOUSEHOLD WHO HAVE ATTENDED OR	TOTAL RESPONDENTS WHO HAVE SEEN OR
28	25	Q. 18 LIKELIHOOD OF ATTENDING A MOTORSPORT FACILITY WITH ROAD RACING	TOTAL RESPONDENTS
29	26	Q. 19 KINDS OF COMPETITIVE EVENTS WOULD LIKE TO SEE OFFERED AT MOTORSPORT	TOTAL RESPONDENTS
30	27	Q. 20 KINDS OF NON-COMPETITIVE EVENTS WOULD LIKE TO SEE OFFERED AT	TOTAL RESPONDENTS
31	28	Q. 21 NUMBER OF OCCASIONS WOULD LIKELY VISIT DURING A SEASON	TOTAL RESPONDENTS
33	29	Q. 22A, B, C, D, E, F BASIC DATA	TOTAL RESPONDENTS
38	30	Q. 22A, B, C, D, E, F BASIC DATA	TOTAL RESPONDENTS

TABLE 1
Q.1 WHETHER EVER WATCHED OR PARTICIPATED IN MOTORSPORT RELATED EVENTS, SHOWS OR MEETS
BASE TOTAL RESPONDENTS

ABSOLUTES/COL %

		SEX		AGE			MARR STATUS		VANCOUVER		OUT-SIDE	INCOME	
	TOTAL	MALE	FE-MALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MAR-RIED	CORE	OUT-SIDE	METRO VAN	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-ACTUAL	267 100.0	143 100.0	124 100.0	153 100.0	68 100.0	44 100.0	108 100.0	156 100.0	124 100.0	82 100.0	59 100.0	96 100.0	101 100.0
BASE FOR PERCENTAGES-WEIGHTED	555 100.0	290 100.0	265 100.0	307 100.0	142 100.0	101 100.0	234 100.0	312 100.0	278 100.0	162 100.0	110 100.0	181 100.0	205 100.0
WHETHER EVER WATCHED OR PARTICIPATED IN MOTORSPORT RELATED EVENTS, SHOWS OR MEETS													
HAVE WATCHED OR PARTICIPATED IN ANY MOTORSPORT RELATED EVENTS	226 40.6	142 48.9	84 31.6	159 51.9	41 28.8	25 24.4	127 54.1	97 31.0	108 38.7	70 43.4	47 43.0	78 43.0	84 41.1
HAVE NOT WATCHED OR PARTICIPATED IN ANY MOTORSPORT RELATED EVENTS	329 59.4	148 51.1	182 68.4	148 48.1	101 71.2	76 75.6	108 45.9	215 69.0	170 61.3	92 56.6	63 57.0	103 57.0	121 58.9

ABSOLUTES/COL %

TABLE 2
Q.2 LEVEL OF INTEREST IN WATCHING OR PARTICIPATING IN MOTORSPORTS, CAR RACING AND CAR SHOWS
BASE TOTAL RESPONDENTS WHO HAVE NEVER WATCHED OR PARTICIPATED IN A MOTORSPORT RELATED EVENT

		SEX		AGE			MARR STATUS		VANCOUVER		OUT-SIDE	INCOME	
	TOTAL	MALE	FE-MALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MAR-RIED	CORE	OUT-SIDE	METRO VAN	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-ACTUAL	124 100.0	55 100.0	69 100.0	55 100.0	38 100.0	30 100.0	36 100.0	86 100.0	61 100.0	36 100.0	25 100.0	42 100.0	46 100.0
BASE FOR PERCENTAGES-WEIGHTED	329 100.0	148 100.0	182 100.0	148 100.0	101 100.0	76 100.0	108 100.0	215 100.0	170 100.0	92 100.0	63 100.0	103 100.0	121 100.0
LEVEL OF INTEREST IN WATCHING OR PARTICIPATING IN MOTORSPORTS, CAR RACING AND CAR SHOWS:													
VERY INTERESTED........X 4	11 3.4	11 7.6	0 0	7 4.5	4 4.4	0 0	7 6.3	4 2.1	2 1.3	4 4.9	4 7.1	2 2.2	4 3.7
SOMEWHAT INTERESTED....X 3	47 14.3	27 18.2	20 11.1	27 18.2	18 17.8	2 2.9	25 22.9	22 10.4	34 19.7	9 9.8	4 7.1	9 8.7	22 18.5
NOT VERY INTERESTED....X 2	61 18.4	20 13.6	40 22.2	29 19.7	20 20.0	11 14.7	20 18.8	40 18.8	27 15.8	16 17.1	18 28.6	27 26.1	20 16.7
NOT AT ALL INTERESTED..X 1	211 63.9	90 60.6	121 66.7	85 57.6	58 57.8	63 82.4	56 52.1	148 68.8	108 63.2	63 68.3	36 57.1	65 63.0	74 61.1
DON'T KNOW	0 0	0 0	0 0	0 0	0 0	0 0	0 0	0 0	0 0	0 0	0 0	0 0	0 0
*MEAN	1.57	1.73	1.44	1.70	1.69	1.21	1.83	1.46	1.59	1.51	1.64	1.50	1.65
STANDARD DEVIATION	.86	1.01	.69	.92	.92	.47	.99	.76	.85	.86	.90	.75	.91
STANDARD ERROR	.05	.08	.05	.08	.09	.05	.10	.05	.06	.09	.11	.07	.08

*MEAN EXCLUDES "DON'T KNOW" RESPONSES

ABSOLUTES/COL %

TABLE 3
Q.3 WHETHER HAVE WATCHED OR PARTICIPATED IN MOTORSPORTS, CAR RACING OR CAR SHOWS IN PAST TWO YEARS
BASE TOTAL RESPONDENTS WHO HAVE WATCHED OR PARTICIPAIED IN ANY MOTORSPORT RELATED EVENT

		SEX		AGE			MARR STATUS		VANCOUVER		OUTSIDE	INCOME	
	TOTAL	MALE	FEMALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MARRIED	CORE	OUTSIDE	METRO VAN	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-ACTUAL	143	88	55	98	30	14	72	70	63	46	34	54	55
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
BASE FOR PERCENTAGES-WEIGHTED	226	142	84	159	41	25	127	97	108	70	47	78	84
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
WHETHER HAVE WATCHED OR PARTICIPATED IN MOTORSPORTS, CAR RACING OR CAR SHOWS IN PAST TWO YEARS:													
WATCHED A MOTORSPORT EVENT OR SHOW ON TELEVISION	205	133	71	151	33	19	118	85	98	65	41	71	79
	90.8	94.2	85.0	94.9	81.9	78.8	93.0	87.7	91.0	92.6	87.4	91.4	93.0
ATTENDED A MOTORSPORT EVENT OR SHOW IN PERSON	99	68	30	78	15	4	65	33	42	32	25	33	43
	43.7	48.3	35.9	48.9	37.8	17.9	51.7	34.3	38.9	44.9	52.7	42.5	50.5
BEEN A PARTICIPANT IN A MOTORSPORT EVENT OR SHOW	18	15	4	15	3	0	10	8	8	6	4	7	8
	8.2	10.4	4.4	9.7	7.2	0	8.1	8.4	7.5	8.3	9.3	9.4	9.6
NONE OF THE ABOVE	13	7	7	7	2	4	7	7	7	2	4	4	2
	6.0	4.7	8.0	4.2	5.5	18.2	5.3	7.0	6.2	3.2	9.5	5.8	2.7

ABSOLUTES/COL %

TABLE 4
Q. 4A MOTORSPORT EVENTS WATCHED ON T.V. IN PAST TWO YEARS
BASE TOTAL RESPONDENTS WHO HAVE SEEN A MOTORSPORT EVENT ON T.V.

		SEX		AGE			MARR. STATUS		VANCOUVER		OUT-SIDE	INCOME	
	TOTAL	MALE	FE-MALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MAR-RIED	CORE	OUT-SIDE	METRO VAN	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-ACTUAL	128 100.0	83 100.0	45 100.0	93 100.0	23 100.0	11 100.0	66 100.0	61 100.0	56 100.0	42 100.0	30 100.0	49 100.0	50 100.0
BASE FOR PERCENTAGES-WEIGHTED	205 100.0	133 100.0	71 100.0	151 100.0	33 100.0	19 100.0	118 100.0	85 100.0	98 100.0	65 100.0	41 100.0	71 100.0	79 100.0
MOTORSPORT EVENTS WATCHED ON T.V. IN PAST TWO YEARS													
AUTO RACING ON A ROAD COURSE	179 87.6	117 87.7	62 87.5	139 92.1	25 73.3	15 76.9	113 96.2	64 75.4	90 91.6	50 76.1	40 96.5	58 81.2	75 95.3
DRAG RACING	120 58.6	85 63.8	35 48.8	96 63.6	10 31.0	13 65.5	75 63.4	45 53.5	58 59.0	40 61.3	22 53.5	36 50.9	52 65.9
OVAL TRACK RACING	148 72.1	96 72.2	51 71.8	110 73.0	18 55.2	19 96.2	85 72.3	62 73.7	71 72.0	47 71.5	30 73.2	50 69.8	54 68.7
MOTORCYCLE RACING	110 53.9	81 61.0	29 40.6	78 51.4	20 59.9	12 61.7	64 54.0	47 55.2	47 47.6	41 62.5	23 55.2	40 56.2	44 56.5
GO-KART RACING	21 10.5												
DEMOLITION DERBIES	85 41.6												
MOTOCROSS	104 51.0												
ICE RACING	33 16.2												
GYMKHANA OR SLALOM RACE	12 5.8												
TRACTOR-PULLS	49 23.8												
A HILL CLIMB RACE	51 24.9												
ROAD RALLY	42 20.3												
FOUR-WHEELER DRIVE EVENT	54 26.4												
MOTOR BOAT RACING	77 37.6												
NONE OF THE ABOVE	0 0												

TABLE 5
Q.4B MOTORSPORT EVENTS ATTENDED IN PAST TWO YEARS
BASE TOTAL RESPONDENTS WHO HAVE ATTENDED A MOTORSPORT EVENT

ABSOLUTES/COL %

		SEX		AGE			MARR STATUS		VANCOUVER		OUT-SIDE	INCOME	
	TOTAL	MALE	FE-MALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MAR-RIED	CORE	OUT-SIDE	METRO VAN	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-ACTUAL	97 100.0	63 100.0	34 100.0	71 100.0	19 100.0	6 100.0	54 100.0	43 100.0	41 100.0	31 100.0	25 100.0	38 100.0	39 100.0
BASE FOR PERCENTAGES-WEIGHTED	99 100.0	68 100.0	30 100.0	78 100.0	15 100.0	4 100.0	65 100.0	33 100.0	42 100.0	32 100.0	25 100.0	33 100.0	43 100.0
MOTORSPORT EVENTS ATTENDED IN PAST TWO YEARS:													
AUTO RACING ON A ROAD COURSE	29 29.9												
DRAG RACING	20 20.1												
OVAL TRACK RACING	30 30.6												
MOTORCYCLE RACING	26 26.1												
GO-KART RACING	4 3.7												
DEMOLITION DERBIES	44 44.8												
MOTOCROSS	24 24.6												
ICE RACING	3 3.0												
GYMKHANA OR SLALOM RACE	4 4.5												
TRACTOR-PULLS	40 41.0												
A HILL CLIMB RACE	5 5.2												
ROAD RALLY	5 5.2												
FOUR-WHEELER DRIVE EVENT	28 28.4												
MOTOR BOAT RACING	6 6.0												
NONE OF THE ABOVE	0 0												

TABLE 6
Q 4C LAST MOTORSPORT EVENT ATTENDED IN PERSON
BASE TOTAL RESPONDENTS WHO HAVE ATTENDED A MOTORSPORT EVENT

ABSOLUTES/COL %

		SEX		AGE			MARR STATUS		VANCOUVER			INCOME	
	TOTAL	MALE	FEMALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MARRIED	CORE	OUTSIDE	OUTSIDE METRO VAN	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-ACTUAL	97 100.0	63 100.0	34 100.0	71 100.0	19 100.0	6 100.0	54 100.0	43 100.0	41 100.0	31 100.0	25 100.0	38 100.0	39 100.0
BASE FOR PERCENTAGES-WEIGHTED	99 100.0	68 100.0	30 100.0	78 100.0	15 100.0	4 100.0	65 100.0	33 100.0	42 100.0	32 100.0	25 100.0	33 100.0	43 100.0
LAST MOTORSPORT EVENT ATTENDED IN PERSON:													
AUTO RACING ON A ROAD COURSE	7 7.5												
DRAG RACING	9 9.0												
OVAL TRACK RACING	12 12.7												
MOTORCYCLE RACING	4 4.5												
GO-KART RACING	0 0												
DEMOLITION DERBIES	18 17.9												
MOTOCROSS	5 5.2												
ICE RACING	0 0												
GYMKHANA OR SLALOM RACE	1 1.5												
TRACTOR-PULLS	27 27.6												
A HILL CLIMB RACE	0 0												
ROAD RALLY	1 1.5												
FOUR-WHEELER DRIVE EVENT	12 11.9												
MOTOR BOAT RACING	1 1.5												
DON'T KNOW	1 1.5												
NONE OF THE ABOVE	0 0												

TABLE 7
Q 4D MOTORSPORT EVENTS PARTICIPATED IN DURING PAST TWO YEARS
BASE TOTAL RESPONDENTS WHO HAVE PARTICIPATED IN A MOTORSPORT EVENT

		SEX		AGE			MARR STATUS		VANCOUVER		OUT-SIDE	INCOME	
	TOTAL	MALE	FE-MALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MAR-RIED	CORE	OUT-SIDE	METRO VAN	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-ACTUAL	21 100.0	17 100.0	4 100.0	17 100.0	4 100.0	0 0	10 100.0	11 100.0	11 100.0	6 100.0	4 100.0	9 100.0	9 100.0
BASE FOR PERCENTAGES-WEIGHTED	18 100.0	15 100.0	4 100.0	15 100.0	3 100.0	0 0	10 100.0	8 100.0	8 100.0	6 100.0	4 100.0	7 100.0	8 100.0
MOTORSPORT EVENTS PARTICIPATED IN DURING PAST TWO YEARS													
AUTO RACING ON A ROAD COURSE	1 8.0												
DRAG RACING	1 8.0												
OVAL TRACK RACING	1 4.0												
MOTORCYCLE RACING	1 4.0												
GO-KART RACING	1 8.0												
DEMOLITION DERBIES	1 4.0												
MOTOCROSS	3 16.0												
ICE RACING	0 0												
GYMKHANA OR SLALOM RACE	4 20.0												
TRACTOR-PULLS	2 12.0												
A HILL CLIMB RACE	1 8.0												
ROAD RALLY	4 24.0												
FOUR-WHEELER DRIVE EVENT	5 28.0												
MOTOR BOAT RACING	1 4.0												
NONE OF THE ABOVE	0 0												

TABLE 8
Q 4E MOTORSPORT EVENTS PARTICIPATED IN ON A REGULAR BASIS
BASE TOTAL RESPONDENTS WHO HAVE PARTICIPATED IN A MOTORSPORT EVENT

ABSOLUTES/COL %

		SEX		AGE			MARR STATUS		VANCOUVER		OUT-SIDE	INCOME	
	TOTAL	MALE	FE-MALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MAR-RIED	CORE	OUT-SIDE	METRO VAN	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-ACTUAL	21 100.0	17 100.0	4 100.0	17 100.0	4 100.0	0 0	10 100.0	11 100.0	11 100.0	6 100.0	4 100.0	9 100.0	9 100.0
BASE FOR PERCENTAGES-WEIGHTED	18 100.0	15 100.0	4 100.0	15 100.0	3 100.0	0 0	10 100.0	8 100.0	8 100.0	6 100.0	4 100.0	7 100.0	8 100.0
MOTORSPORT EVENTS PARTICIPATED IN ON A REGULAR BASIS													
AUTO RACING ON A ROAD COURSE	1 4.0												
DRAG RACING	0 0												
OVAL TRACK RACING	0 0												
MOTORCYCLE RACING	0 0												
GO-KART RACING	1 4.0												
DEMOLITION DERBIES	0 0												
MOTOCROSS	2 12.0												
ICE RACING	0 0												
GYMKHANA OR SLALOM RACE	1 8.0												
TRACTOR-PULLS	0 0												
A HILL CLIMB RACE	1 4.0												
ROAD RALLY	2 12.0												
FOUR-WHEELER DRIVE EVENT	1 8.0												
MOTOR BOAT RACING	1 4.0												
NONE OF THE ABOVE	12 64.0												

ABSOLUTES/COL %

TABLE 9
Q 3 WHETHER A SPECTATOR OR PARTICIPANT IN LAST MOTORSPORT EVENT ATTENDED
BASE TOTAL RESPONDENTS WHO HAVE SEEN OR PARTICIPATED IN A MOTORSPORT RELATED EVENT IN PAST 2 YEARS

		SEX		AGE			MARR STATUS		VANCOUVER		OUT-SIDE	INCOME	
	TOTAL	MALE	FE-MALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MAR-RIED	CORE	OUT-SIDE	METRO VAN.	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-ACTUAL	99 100.0	65 100.0	34 100.0	72 100.0	20 100.0	6 100.0	55 100.0	44 100.0	42 100.0	32 100.0	25 100.0	38 100.0	41 100.0
BASE FOR PERCENTAGES-WEIGHTED	100 100.0	70 100.0	30 100.0	79 100.0	16 100.0	4 100.0	66 100.0	34 100.0	43 100.0	32 100.0	25 100.0	33 100.0	44 100.0
WHETHER A SPECTATOR OR PARTICIPANT IN LAST MOTORSPORT EVENT ATTENDED													
SPECTATOR	93 93.4												
PARTICIPANT	7 6.6												

TABLE 10
Q.6 WHEN ATTENDED LAST MOTORSPORT EVENT
BASE TOTAL RESPONDENTS WHO HAVE SEEN OR PARTICIPATED IN A MOTORSPORT RELATED EVENT IN PAST 2 YEARS

		SEX		AGE			MARR	STATUS	VANCOUVER		OUT-SIDE	INCOME	
	TOTAL	MALE	FE-MALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MAR-RIED	CORE	OUT-SIDE	METRO VAN	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-ACTUAL	99 100.0	65 100.0	34 100.0	72 100.0	20 100.0	6 100.0	55 100.0	44 100.0	42 100.0	32 100.0	25 100.0	38 100.0	41 100.0
BASE FOR PERCENTAGES-WEIGHTED	100 100.0	70 100.0	30 100.0	79 100.0	16 100.0	4 100.0	66 100.0	34 100.0	43 100.0	32 100.0	25 100.0	33 100.0	44 100.0
WHEN ATTENDED LAST MOTORSPORT EVENT													
1 - 2 MONTHS AGO	4 3.7												
3 - 5 MONTHS AGO	20 19.9												
6 - 8 MONTHS AGO	35 35.3												
9 - 11 MONTHS AGO	7 7.4												
1 YEAR AGO	15 14.7												
MORE THAN A YEAR AGO	19 19.1												
DON'T KNOW	0 0												

TABLE 11
Q 7 LOCATION OF LAST MOTORSPORT EVENT ATTENDED
BASE TOTAL RESPONDENTS WHO HAVE SEEN OR PARTICIPATED IN A MOTORSPORT RELATED EVENT IN PAST 2 YEARS

		SEX		AGE			MARR STATUS		VANCOUVER		OUT-SIDE	INCOME	
	TOTAL	MALE	FE-MALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MAR-RIED	CORE	OUT-SIDE	METRO VAN	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-ACTUAL	99 100.0	63 100.0	34 100.0	72 100.0	20 100.0	6 100.0	55 100.0	44 100.0	42 100.0	32 100.0	25 100.0	38 100.0	41 100.0
BASE FOR PERCENTAGES-WEIGHTED	100 100.0	70 100.0	30 100.0	79 100.0	16 100.0	4 100.0	66 100.0	34 100.0	43 100.0	32 100.0	25 100.0	33 100.0	44 100.0
LOCATION OF LAST MOTORSPORT EVENT ATTENDED													
VANCOUVER CITY	47 47.1												
COQUITLAM	10 9.6												
LANGLEY	8 8.1												
MISSION	6 5.9												
AGASSIZ (KENT)	5 5.1												
CLOVERDALE/ALDERGROVE	1 1.5												
CHILLIWACK/ABBOTSFORD/MATSQUI	4 3.7												
OTHER B.C.	4 3.7												
ALBERTA	1 .7												
ONTARIO	3 2.9												
WASHINGTON STATE	8 8.1												
PORTLAND, OREGON	1 .7												
ATLANTA, GEORGIA	1 .7												
RENO, NEVADA	1 1.5												
DON'T KNOW	1 .7												

TABLE 12
Q. 8A TYPE OF TRANSPORTATION USED TO ATTEND EVENT
BASE TOTAL RESPONDENTS WHO HAVE SEEN OR PARTICIPATED IN A MOTORSPORT RELATED EVENT IN PAST 2 YEARS

		SEX		AGE			MARR. STATUS		VANCOUVER		OUT-SIDE	INCOME	
	TOTAL	MALE	FE-MALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MAR-RIED	CORE	OUT-SIDE	METRO VAN	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-ACTUAL	99	65	34	72	20	6	55	44	42	32	25	38	41
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
BASE FOR PERCENTAGES-WEIGHTED	100	70	30	79	16	4	66	34	43	32	25	33	44
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
TYPE OF TRANSPORTATION USED TO ATTEND EVENT													
CAR	76												
	76.5												
TRUCK, VAN OR MOTORHOME	9												
	8.8												
MOTORCYCLE	6												
	5.9												
TRAIN	0												
	0												
PLANE	2												
	2.2												
TRACTOR	1												
	.7												
BUS	3												
	2.9												
WALKED	3												
	2.9												

TABLE 13
Q.88 APPROXIMATE TRAVEL TIME BY ROAD FROM HOME TO LAST EVENT ATTENDED
BASE TOTAL RESPONDENTS WHO TRAVELLED BY ROAD TO LAST EVENT ATTENDED

		SEX		AGE			MARR STATUS		VANCOUVER		OUT-SIDE	INCOME	
	TOTAL	MALE	FE-MALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MAR-RIED	CORE	OUT-SIDE	METRO VAN	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-ACTUAL	91 100.0	60 100.0	31 100.0	66 100.0	20 100.0	4 100.0	49 100.0	42 100.0	36 100.0	32 100.0	23 100.0	34 100.0	38 100.0
BASE FOR PERCENTAGES-WEIGHTED	91 100.0	65 100.0	26 100.0	71 100.0	16 100.0	3 100.0	59 100.0	32 100.0	35 100.0	32 100.0	24 100.0	30 100.0	40 100.0
APPROXIMATE TRAVEL TIME BY ROAD FROM HOME TO LAST EVENT ATTENDED:													
2 TO 10 MINUTES													
11 TO 20 MINUTES													
21 TO 30 MINUTES													
31 TO 40 MINUTES													
41 TO 50 MINUTES													
51 TO 1 HOUR													
OVER 1 HOUR TO 2 HOURS													
OVER 2 HOURS TO 3 HOURS													
OVER 3 HOURS													
*MEAN (IN MINUTES)													
STANDARD DEVIATION													
STANDARD ERROR													

*MEAN EXCLUDES "20 HOURS OR MORE" RESPONSES

TABLE 14
Q.9 WHO ATTENDED LAST EVENT WITH
BASE TOTAL RESPONDENTS WHO HAVE SEEN OR PARTICIPATED IN A MOTORSPORT RELATED EVENT IN PAST 2 YEARS

		SEX		AGE			MARR. STATUS		VANCOUVER		OUT-SIDE	INCOME	
	TOTAL	MALE	FE-MALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MAR-RIED	CORE	OUT-SIDE	METRO VAN	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-ACTUAL	99 100.0	65 100.0	34 100.0	72 100.0	20 100.0	6 100.0	55 100.0	44 100.0	42 100.0	32 100.0	25 100.0	38 100.0	41 100.0
BASE FOR PERCENTAGES-WEIGHTED	100 100.0	70 100.0	30 100.0	79 100.0	16 100.0	4 100.0	66 100.0	34 100.0	43 100.0	32 100.0	25 100.0	33 100.0	44 100.0
WHO ATTENDED LAST EVENT WITH:													
SELF ONLY	6 5.9												
SELF AND FRIEND(S)	65 65.4												
SELF AND FAMILY	23 22.8												
SELF, FRIEND(S) AND FAMILY	4 3.7												
OTHER	2 2.2												

```
TABLE    15                                                                                   ABSOLUTES/COL %
Q.10 TOTAL NUMBER OF PERSONS ATTENDED LAST EVENT WITH
BASE TOTAL RESPONDENTS WHO HAVE SEEN OR PARTICIPATED IN A MOTORSPORT RELATED EVENT IN PAST 2 YEARS

                                         SEX          AGE                       MARR. STATUS VANCOUVER    OUT-  INCOME
                                         ----------- -----------------------  ------------ -----------  SIDE  -----------
                                               FE-   18-34 35-54 55 OR               MAR-         OUT- METRO UNDER $30 M
                                 TOTAL   MALE  MALE  YEARS YEARS OLDER  SINGLE  RIED  CORE  SIDE  VAN  $30 M  OVER
                                 -----   ----  ----  ----- ----- -----  ------  ----  ----  ----  ---- -----  -----

BASE FOR PERCENTAGES-ACTUAL         99     65    34     72    20     6      55    44    42     32    25    38     41
                                 100.0  100.0 100.0  100.0 100.0 100.0   100.0 100.0100.0  100.0 100.0 100.0  100.0

BASE FOR PERCENTAGES-WEIGHTED      100     70    30     79    16     4      66    34    43     32    25    33     44
                                 100.0  100.0 100.0  100.0 100.0 100.0   100.0 100.0100.0  100.0 100.0 100.0  100.0

TOTAL NUMBER OF PERSONS
ATTENDED LAST EVENT WITH:
-------------------------
  SELF ONLY/OTHER                    8
                                   8.1

  TWO PEOPLE                        26
                                  25.7

  THREE PEOPLE                      14
                                  14.0

  FOUR PEOPLE                       23
                                  22.8

  FIVE PEOPLE                       13
                                  13.2

  SIX PEOPLE                         9
                                   8.8

  SEVEN PEOPLE                       1
                                    .7

  EIGHT PEOPLE                       2
                                   2.2

  NINE                               1
                                    .7

  TWELVE PEOPLE                      1
                                   1.5

  FIFTEEN PEOPLE                     2
                                   2.2
```

ABSOLUTES/COL %

TABLE 16
Q.11A LENGTH OF TIME OF LAST EVENT
BASE TOTAL RESPONDENTS WHO HAVE SEEN OR PARTICIPATED IN A MOTORSPORT RELATED EVENT IN PAST 2 YEARS

		SEX		AGE			MARR. STATUS		VANCOUVER		OUT-SIDE	INCOME	
	TOTAL	MALE	FE-MALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MAR-RIED	CORE	OUT-SIDE	METRO VAN	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-ACTUAL	99	65	34	72	20	6	55	44	42	32	25	38	41
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
BASE FOR PERCENTAGES-WEIGHTED	100	70	30	79	16	4	66	34	43	32	25	33	44
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
LENGTH OF TIME OF LAST EVENT:													
HALF-DAY	48												
	47.8												
ONE FULL DAY	21												
	21.3												
TWO DAYS	12												
	12.5												
THREE DAYS	14												
	14.0												
FOUR DAYS	0												
	0												
FIVE DAYS	0												
	0												
MORE THAN FIVE DAYS	4												
	3.7												
DON'T KNOW/CAN'T RECALL	1												
	.7												

TABLE 17
Q 11B LENGTH OF TIME STAYED AT LAST EVENT
BASE TOTAL RESPONDENTS WHO HAVE SEEN OR PARTICIPATED IN A MOTORSPORT RELATED EVENT IN PAST 2 YEARS

		SEX		AGE			MARR STATUS		VANCOUVER		OUT-SIDE	INCOME	
	TOTAL	MALE	FE-MALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MAR-RIED	CORE	OUT-SIDE	METRO VAN	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-ACTUAL	99 100.0	65 100.0	34 100.0	72 100.0	20 100.0	6 100.0	55 100.0	44 100.0	42 100.0	32 100.0	25 100.0	38 100.0	41 100.0
BASE FOR PERCENTAGES-WEIGHTED	100 100.0	70 100.0	30 100.0	79 100.0	16 100.0	4 100.0	66 100.0	34 100.0	43 100.0	32 100.0	25 100.0	33 100.0	44 100.0
LENGTH OF TIME STAYED AT LAST EVENT:													
HALF-DAY	61 61.0												
ONE FULL DAY	30 30.1												
TWO DAYS	7 7.4												
THREE DAYS	1 1.5												
FOUR DAYS	0 0												
FIVE DAYS	0 0												
MORE THAN FIVE DAYS	0 0												
DON'T KNOW/CAN'T RECALL	0 0												

TABLE 18
Q.12 APPROXIMATE TOTAL DOLLAR AMOUNT SPENT AT LAST EVENT
BASE TOTAL RESPONDENTS WHO HAVE SEEN OR PARTICIPATED IN A MOTORSPORT RELATED EVENT IN PAST 2 YEARS

ABSOLUTES/COL %

		SEX		AGE			MARR STATUS		VANCOUVER			INCOME	
	TOTAL	MALE	FE-MALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MAR-RIED	CORE	OUT-SIDE	OUT-SIDE METRO VAN	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-ACTUAL	99	65	34	72	20	6	55	44	42	32	25	38	41
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
BASE FOR PERCENTAGES-WEIGHTED	100	70	30	79	16	4	66	34	43	32	25	33	44
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
APPROXIMATE TOTAL DOLLAR AMOUNT SPENT AT LAST EVENT:													
UNDER $5	4												
	3.7												
$5 TO $10	7												
	7.4												
$11 TO $20	12												
	11.8												
$21 TO $30	7												
	7.4												
$31 TO $40	7												
	7.4												
$41 TO $50	10												
	10.3												
$51 TO $60	15												
	15.4												
$61 TO $100	25												
	25.0												
OVER $100	9												
	8.8												
DON'T KNOW	3												
	2.9												
*MEAN	65.88												
STANDARD DEVIATION	62.97												
STANDARD ERROR	6.39												

*MEAN EXCLUDES "DON'T KNOW" RESPONSES

TABLE 19
Q.13 FAVOURITE COMPETITIVE MOTORSPORT EVENT
BASE TOTAL RESPONDENTS WHO HAVE SEEN OR PARTICIPATED IN A MOTORSPORT RELATED EVENT IN PAST 2 YEARS

ABSOLUTES/COL %

		SEX		AGE			MARR STATUS		VANCOUVER		OUT-SIDE	INCOME	
	TOTAL	MALE	FE-MALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MAR-RIED	CORE	OUT-SIDE	METRO VAN	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-ACTUAL	99	65	34	72	20	6	55	44	42	32	25	38	41
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
BASE FOR PERCENTAGES-WEIGHTED	100	70	30	79	16	4	66	34	43	32	25	33	44
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
FAVOURITE COMPETITIVE MOTORSPORT EVENT													
AUTO RACING ON A ROAD COURSE	19												
	19.1												
DRAG RACING	18												
	18.4												
OVAL TRACK RACING	11												
	11.0												
MOTORCYCLE RACING	6												
	5.9												
GO-KART RACING	0												
	0												
TRACTOR-PULLS	8												
	8.1												
DEMOLITION DERBIES	9												
	8.8												
A HILL CLIMB RACE	1												
	.7												
MOTOCROSS	13												
	13.2												
ROAD RALLY	1												
	1.5												
FOUR-WHEELER DRIVE EVENT	7												
	7.4												
GYMKHANA OR SLALOM RACE	1												
	.7												
MOTOR BOAT RACING	3												
	2.9												
ICE RACING	0												
	0												
NONE	1												
	1.5												
DON'T KNOW	1												
	.7												

TABLE 20
Q 14A NON-COMPETITIVE MOTORSPORT EVENTS ATTENDED AS A PARTICIPANT OR SPECTATOR
BASE TOTAL RESPONDENTS WHO HAVE SEEN OR PARTICIPATED IN A MOTORSPORT RELATED EVENT IN PAST 2 YEARS

		SEX		AGE			MARR. STATUS		VANCOUVER			INCOME	
	TOTAL	MALE	FE-MALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MAR-RIED	CORE	OUT-SIDE	OUT-SIDE METRO VAN	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-ACTUAL	99 100.0	65 100.0	34 100.0	72 100.0	20 100.0	6 100.0	55 100.0	44 100.0	42 100.0	32 100.0	25 100.0	38 100.0	41 100.0
BASE FOR PERCENTAGES-WEIGHTED	100 100.0	70 100.0	30 100.0	79 100.0	16 100.0	4 100.0	66 100.0	34 100.0	43 100.0	32 100.0	25 100.0	33 100.0	44 100.0
NON-COMPETITIVE MOTORSPORT EVENTS ATTENDED AS A PARTICIPANT OR SPECTATOR:													
AUTO SHOW	84 83.8												
CUSTOM CAR SHOW	65 64.7												
AUTO SWAP MEET	21 21.3												
AUTO CLUB PICNIC OR RALLY	19 19.1												
SHOW & SHINE	7 7.4												
PARADES	31 30.9												
AUCTION	1 .7												
BOAT SHOW	1 .7												
RECREATIONAL VEHICLE SHOW	1 .7												
MOTORCYCLE SHOW	1 .7												
BIKE SWAP	1 1.5												
NONE	12 12.5												

ABSOLUTES/COL %

TABLE 21
Q 148 LAST NON-COMPETITIVE MOTORSPORT EVENT ATTENDED
BASE TOTAL RESPONDENTS WHO HAVE SEEN OR PARTICIPATED IN A MOTORSPORT RELATED EVENT IN PAST 2 YEARS

		SEX		AGE			MARR STATUS		VANCOUVER			INCOME	
	TOTAL	MALE	FE-MALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MAR-RIED	CORE	OUT-SIDE	OUT-SIDE METRO VAN	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-ACTUAL	99 100 0	65 100 0	34 100 0	72 100 0	20 100 0	6 100 0	55 100 0	44 100.0	42 100 0	32 100 0	25 100.0	38 100 0	41 100 0
BASE FOR PERCENTAGES-WEIGHTED	100 100 0	70 100 0	30 100 0	79 100 0	16 100 0	4 100 0	66 100 0	34 100.0	43 100 0	32 100 0	25 100 0	33 100 0	44 100 0
LAST NON-COMPETITIVE MOTORSPORT EVENT ATTENDED													
AUTO SHOW	41 41 2	30 43 2	11 36 6	32 41 1	8 50 0	1 16 7	26 40 0	15 43 5	21 48 3	12 38 6	8 32 4	13 40 0	18 40 0
CUSTOM CAR SHOW	21 20 6	15 21 1	6 19 5	19 24 3	1 4 5	1 16 7	18 26 7	3 8 7	4 8 6	10 29 5	7 29 4	6 17 8	12 28 3
AUTO SWAP MEET	3 2 9												
AUTO CLUB PICNIC OR RALLY	4 3 7												
SHOW & SHINE	2 2 2												
PARADES	16 16 2												
BIKE SWAP	1 1.5												
NONE	15 14 7												

TABLE 22
Q 15 MOTORSPORT FACILITIES IN THE LOWER MAINLAND EVER VISITED
BASE TOTAL RESPONDENTS WHO HAVE SEEN OR PARTICIPATED IN A MOTORSPORT RELATED EVENT IN PAST 2 YEARS

ABSOLUTES/COL %

		SEX		AGE			MARR. STATUS		VANCOUVER		OUT-SIDE	INCOME	
	TOTAL	MALE	FE-MALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MAR-RIED	CORE	OUT-SIDE	METRO VAN	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-ACTUAL	99 100.0	65 100.0	34 100.0	72 100.0	20 100.0	6 100.0	55 100.0	44 100.0	42 100.0	32 100.0	25 100.0	38 100.0	41 100.0
BASE FOR PERCENTAGES-WEIGHTED	100 100.0	70 100.0	30 100.0	79 100.0	16 100.0	4 100.0	66 100.0	34 100.0	43 100.0	32 100.0	25 100.0	33 100.0	44 100.0
MOTORSPORT FACILITIES IN THE LOWER MAINLAND EVER VISITED:													
WESTWOOD PARK	32 32.2	43 61.1	10 31.7	44 56.1	8 50.0	0 0	38 57.8	14 41.3	26 62.1	17 52.3	9 35.3	15 44.4	27 61.7
ACTION RACEWAY	32 31.6	20 28.4	12 39.0	25 31.8	6 36.4	1 16.7	24 35.6	8 23.9	12 27.6	14 43.2	6 23.5	9 26.7	18 41.7
MISSION RACEWAY	46 46.3	36 51.6	10 34.1	39 49.5	7 40.9	1 16.7	32 48.9	14 41.3	11 25.9	18 54.5	18 70.6	18 55.6	21 48.3
KENT RACEWAY	24 24.3												
B.C. PLACE	13 13.2												
P.N.E.	10 10.3												
NONE	13 13.2												

TABLE 23
Q 16 IMPORTANCE OF FACTORS WHEN DECIDING WHETHER TO ATTEND A MOTORSPORT EVENT
BASE TOTAL RESPONDENTS WHO HAVE SEEN OR PARTICIPATED IN A MOTORSPORT RELATED EVENT IN PAST 2 YEARS

ABSOLUTES/COL %

			SEX		AGE			MARR STATUS		VANCOUVER		OUT-SIDE	INCOME	
		TOTAL	MALE	FE-MALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MAR-RIED	CORE	OUT-SIDE	METRO VAN	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-ACTUAL		99 100 0	65 100 0	34 100 0	72 100 0	20 100 0	6 100 0	55 100 0	44 100 0	42 100 0	32 100 0	25 100 0	38 100 0	41 100 0
BASE FOR PERCENTAGES-WEIGHTED		100 100 0	70 100 0	30 100 0	79 100 0	16 100 0	4 100 0	66 100 0	34 100 0	43 100 0	32 100 0	25 100 0	33 100 0	44 100 0
THE EVENT BE A LOCALLY SPONSORED EVENT:														
VERY IMPORTANT	X 5	16 16 2												
SOMEWHAT IMPORTANT	X 4	23 22 8												
NEITHER	X 3	12 12 5												
SOMEWHAT UNIMPORTANT	X 2	31 30 9												
NOT AT ALL IMPORTANT	X 1	18 17 6												
DON'T KNOW		0 0												
*MEAN		2 89												
STANDARD DEVIATION		1 38												
STANDARD ERROR		14												
THE EVENT BE OF A NATIONAL CALIBRE														
VERY IMPORTANT	X 5	10 9 6												
SOMEWHAT IMPORTANT	X 4	38 38 2												
NEITHER	X 3	11 11 0												
SOMEWHAT UNIMPORTANT	X 2	26 26 5												
NOT AT ALL IMPORTANT	X 1	14 14 0												
DON'T KNOW		1 7												
*MEAN		3 03												
STANDARD DEVIATION		1 27												
STANDARD ERROR		13												

ABSOLUTES/COL %

TABLE 23
Q.16 IMPORTANCE OF FACTORS WHEN DECIDING WHETHER TO ATTEND A MOTORSPORT EVENT
BASE TOTAL RESPONDENTS WHO HAVE SEEN OR PARTICIPATED IN A MOTORSPORT RELATED EVENT IN PAST 2 YEARS

		SEX		AGE			MARR STATUS		VANCOUVER		OUT-SIDE	INCOME	
	TOTAL	MALE	FE-MALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MAR-RIED	CORE	OUT-SIDE	METRO VAN	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-WEIGHTED	100 100.0	70 100.0	30 100.0	79 100.0	16 100.0	4 100.0	66 100.0	34 100.0	43 100.0	32 100.0	25 100.0	33 100.0	44 100.0
THE EVENT FEATURE WELL KNOWN DRIVERS AND TEAMS													
VERY IMPORTANT........ X 5	17 16.9												
SOMEWHAT IMPORTANT.... X 4	43 43.4												
NEITHER............... X 3	12 11.8												
SOMEWHAT UNIMPORTANT.. X 2	18 17.6												
NOT AT ALL IMPORTANT.. X 1	10 10.3												
DON'T KNOW	0 0												
*MEAN	3.39												
STANDARD DEVIATION	1.25												
STANDARD ERROR	.12												
THE EVENT BE CLOSE ENOUGH TO WHERE I LIVE TO MAKE ATTENDANCE A DAY TRIP.													
VERY IMPORTANT........ X 5	35 34.6												
SOMEWHAT IMPORTANT.... X 4	48 47.8												
NEITHER............... X 3	6 5.9												
SOMEWHAT UNIMPORTANT.. X 2	7 6.6												
NOT AT ALL IMPORTANT.. X 1	5 5.1												
DON'T KNOW	0 0												
*MEAN	4.00												
STANDARD DEVIATION	1.07												
STANDARD ERROR	.11												

TABLE 23

ABSOLUTES/COL %

Q.16 IMPORTANCE OF FACTORS WHEN DECIDING WHETHER TO ATTEND A MOTORSPORT EVENT
BASE TOTAL RESPONDENTS WHO HAVE SEEN OR PARTICIPATED IN A MOTORSPORT RELATED EVENT IN PAST 2 YEARS

		TOTAL	SEX		AGE			MARR STATUS		VANCOUVER		OUT-SIDE	INCOME	
			MALE	FE-MALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MAR-RIED	CORE	OUT-SIDE	METRO VAN	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-WEIGHTED		100 100.0	70 100.0	30 100.0	79 100.0	16 100.0	4 100.0	66 100.0	34 100.0	43 100.0	32 100.0	25 100.0	33 100.0	44 100.0
THE EVENT BE IN A WORLD CLASS FACILITY														
VERY IMPORTANT	X 5	9 8.8												
SOMEWHAT IMPORTANT	X 4	44 44.1												
NEITHER	X 3	10 10.3												
SOMEWHAT UNIMPORTANT	X 2	21 20.6												
NOT AT ALL IMPORTANT	X 1	16 16.2												
DON'T KNOW		0 0												
*MEAN		3.09												
STANDARD DEVIATION		1.29												
STANDARD ERROR		.13												
THE EVENT BE HELD EACH AND EVERY YEAR														
VERY IMPORTANT	X 5	19 19.1												
SOMEWHAT IMPORTANT	X 4	42 41.9												
NEITHER	X 3	16 16.2												
SOMEWHAT UNIMPORTANT	X 2	12 12.5												
NOT AT ALL IMPORTANT	X 1	10 10.3												
DON'T KNOW		0 0												
*MEAN		3.47												
STANDARD DEVIATION		1.23												
STANDARD ERROR		.12												

```
TABLE    23
Q 16 IMPORTANCE OF FACTORS WHEN DECIDING WHETHER TO ATTEND A MOTORSPORT EVENT
BASE TOTAL RESPONDENTS WHO HAVE SEEN OR PARTICIPATED IN A MOTORSPORT RELATED EVENT IN PAST 2 YEARS

                                       SEX          AGE                  MARR  STATUS VANCOUVER      OUT-  INCOME
                                    ----------- -------------------- ------------ ------------  SIDE  -----------
                                            FE-  18-34 35-54 55 OR          MAR-           OUT- METRO UNDER $30 M
                               TOTAL  MALE  MALE YEARS YEARS OLDER  SINGLE  RIED  CORE   SIDE  VAN  $30 M  OVER
                               -----  ----  ---- ----- ----- -----  ------ ----- ----   ----  ----  ----- -----

BASE FOR PERCENTAGES-WEIGHTED    100    70    30    79    16     4      66    34   43     32    25    33    44
                               100.0 100.0 100.0 100.0 100.0 100.0   100.0 100.0100.0 100.0 100.0 100.0 100.0

THE ADMISSION PRICE BE
COMPARABLE TO A MOVIE
SHOW OR OTHER SIMILAR
ENTERTAINMENT:
---------------------
  VERY IMPORTANT .......X 5       46
                                45.6

  SOMEWHAT IMPORTANT....X 4       32
                                32.4

  NEITHER...............X 3        7
                                 6.6

  SOMEWHAT UNIMPORTANT..X 2       10
                                10.3

  NOT AT ALL IMPORTANT..X 1        5
                                 5.1

  DON'T KNOW                       0
                                   0

  *MEAN                         4.03

  STANDARD DEVIATION            1.19

  STANDARD ERROR                 .12
```

ABSOLUTES/COL %

TABLE 24
Q 17 NUMBER OF OTHER PERSONS IN HOUSEHOLD WHO HAVE ATTENDED OR PARTICIPATED IN A MOTORSPORT RELATED EVENT IN PAST TWO YEARS
BASE TOTAL RESPONDENTS

		SEX		AGE			MARR STATUS		VANCOUVER		OUT-SIDE	INCOME	
	TOTAL	MALE	FE-MALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MAR-RIED	CORE	OUT-SIDE	METRO VAN	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-ACTUAL	267 100 0	143 100 0	124 100 0	153 100 0	68 100 0	44 100 0	108 100 0	156 100 0	124 100 0	92 100 0	59 100 0	96 100 0	101 100 0
BASE FOR PERCENTAGES-WEIGHTED	555 100 0	290 100 0	265 100 0	307 100 0	142 100 0	101 100 0	234 100 0	312 100 0	278 100 0	162 100 0	110 100 0	181 100 0	205 100 0
NUMBER OF OTHER PERSONS IN HOUSEHOLD WHO HAVE ATTENDED OR PARTICIPATED IN A MOTORSPORT RELATED EVENT IN PAST TWO YEARS													
NONE	411 74 1												
ONE PERSON	79 14 3												
TWO PEOPLE	24 4 4												
THREE PEOPLE	22 4 0												
FOUR PEOPLE	7 1 2												
FIVE PEOPLE	4 7												
SIX PEOPLE OR MORE	3 5												
DON'T KNOW	4 8												

```
                                                                                                   ABSOLUTES/COL %
TABLE   25
Q 18 LIKELIHOOD OF ATTENDING A MOTORSPORT FACILITY WITH ROAD RACING CIRCUIT, OVAL TRACK AND OTHER FEATURES
BASE TOTAL RESPONDENTS

                                          SEX          AGE                 MARR  STATUS VANCOUVER    OUT-  INCOME
                                          ----------- -------------------- ------------ ----------   SIDE  -----------
                                                 FE-  18-34 35-54 55 OR               MAR-          OUT-  METRO UNDER $30 M
                                   TOTAL  MALE  MALE  YEARS YEARS OLDER  SINGLE  RIED  CORE  SIDE   VAN  $30 M  OVER
                                   -----  ----  ----  ----- ----- -----  ------  ----  ----  ----  -----  ----- -----

BASE FOR PERCENTAGES-ACTUAL          267   143   124   153    68    44     108   156   124    82    59    96   101
                                   100.0 100.0 100.0 100.0 100.0 100.0   100.0 100.0100.0 100.0 100.0 100.0 100.0

BASE FOR PERCENTAGES-WEIGHTED        555   290   265   307   142   101     234   312   278   162   110   181   205
                                   100.0 100.0 100.0 100.0 100.0 100.0   100.0 100.0100.0 100.0 100.0 100.0 100.0

LIKELIHOOD OF ATTENDING A MOTORSPORT
FACILITY WITH ROAD RACING CIRCUIT,
OVAL TRACK AND OTHER FEATURES:
-------------------------------------
  VERY LIKELY..........X 4           130
                                    23.5

  SOMEWHAT LIKELY......X 3            98
                                    17.6

  SOMEWHAT UNLIKELY....X 2            80
                                    14.4

  NOT AT ALL LIKELY....X 1           238
                                    42.9

  DON'T KNOW                           9
                                     1.6

  *MEAN                             2.22

  STANDARD DEVIATION                1.23

  STANDARD ERROR                     .05

    *MEAN EXCLUDES "DON'T KNOW" RESPONSES
```

TABLE 26
Q 19 KINDS OF COMPETITIVE EVENTS WOULD LIKE TO SEE OFFERED AT MOTORSPORT FACILITY
BASE TOTAL RESPONDENTS

		SEX		AGE			MARR STATUS		VANCOUVER		OUT-SIDE	INCOME	
	TOTAL	MALE	FE-MALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MAR-RIED	CORE	OUT-SIDE	METRO VAN	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-ACTUAL	267 100.0	143 100.0	124 100.0	153 100.0	68 100.0	44 100.0	108 100.0	156 100.0	124 100.0	82 100.0	59 100.0	96 100.0	101 100.0
BASE FOR PERCENTAGES-WEIGHTED	555 100.0	290 100.0	265 100.0	307 100.0	142 100.0	101 100.0	234 100.0	312 100.0	278 100.0	162 100.0	110 100.0	181 100.0	205 100.0
KINDS OF COMPETITIVE EVENTS WOULD LIKE TO SEE OFFERED AT MOTORSPORT FACILITY:													
DRAG RACING	113 20.3												
MOTOCROSS	72 12.9												
MOTORCYCLE RACING	72 13.0												
DEMOLITION DERBIES	31 5.6												
OVAL TRACK RACING	88 15.8												
GO-KART RACING	11 2.0												
FOUR-WHEELER DRIVE EVENTS	50 9.1												
TRACTOR-PULLS	27 4.9												
ROAD RACE/CIRCUIT RACE	19 3.3												
GRAND PRIX CIRCUIT ROAD RACE	36 6.4												
HILL CLIMB RACE	4 .7												
AMATEUR CAR RACING UNSPECIFIED	9 1.6												
AUTO RACING (ANYKIND)	39 7.1												
MOTOR BOAT RACING	4 .7												
MISCELLANEOUS COMMENTS	7 1.3												
NOT INTERESTED	112 20.2												
NONE	53 9.6												
DON'T KNOW	125 22.5												

TABLE 27
Q 20 KINDS OF NON-COMPETITIVE EVENTS WOULD LIKE TO SEE OFFERED AT MOTORSPORT FACILITY
BASE TOTAL RESPONDENTS

		SEX		AGE			MARR STATUS		VANCOUVER			INCOME	
	TOTAL	MALE	FE-MALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MAR-RIED	CORE	OUT-SIDE	OUT-SIDE METRO VAN	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-ACTUAL	267 100.0	143 100.0	124 100.0	153 100.0	68 100.0	44 100.0	108 100.0	156 100.0	124 100.0	82 100.0	59 100.0	96 100.0	101 100.0
BASE FOR PERCENTAGES-WEIGHTED	555 100.0	290 100.0	265 100.0	307 100.0	142 100.0	101 100.0	234 100.0	312 100.0	278 100.0	162 100.0	110 100.0	181 100.0	205 100.0
KINDS OF NON-COMPETITIVE EVENTS WOULD LIKE TO SEE OFFERED AT MOTORSPORT FACILITY:													
ANTIQUE/CLASSIC CAR SHOW	62 11.2												
CUSTOM CAR SHOW	59 10.7												
RECREATIONAL VEHICLES SHOW	19 3.3												
MOTORCYCLE SHOW	10 1.7												
NEW CAR DISPLAYS/SHOW	24 4.3												
AUTO SWAP MEET	6 1.1												
SHOW & SHINE	1 1												
PARADES	3 .5												
CLUB EVENTS	1 3												
CAR SHOW (UNSPECIFIED)	76 13.8												
MISCELLANEOUS COMMENTS	8 1.5												
BOAT SHOW	5 9												
NOT INTERESTED	47 8.5												
NONE	126 22.7												
DON'T KNOW	184 33.1												

TABLE 28
Q 21 NUMBER OF OCCASIONS WOULD LIKELY VISIT DURING A SEASON
BASE TOTAL RESPONDENTS

ABSOLUTES/COL %

		SEX		AGE			MARR STATUS		VANCOUVER		OUT-SIDE	INCOME	
	TOTAL	MALE	FE-MALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MAR-RIED	CORE	OUT-SIDE	METRO VAN	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-ACTUAL	267 100 0	143 100 0	124 100 0	153 100 0	68 100.0	44 100.0	108 100 0	156 100 0	124 100 0	82 100 0	59 100 0	96 100 0	101 100 0
BASE FOR PERCENTAGES-WEIGHTED	555 100 0	290 100 0	265 100 0	307 100 0	142 100 0	101 100 0	234 100 0	312 100 0	278 100 0	162 100 0	110 100 0	181 100 0	205 100.0
NUMBER OF OCCASIONS WOULD LIKELY VISIT DURING A SEASON													
NONE	244 44 0												
ONE TIME	52 9 4												
TWO TIMES	86 15.5												
THREE TIMES	23 4 2												
FOUR TIMES	15 2.7												
FIVE TIMES	38 6.8												
SIX TIMES	18 3.2												
SEVEN TIMES	5 .9												
EIGHT TIMES	6 1.1												
NINE TIMES	1 .3												
TEN TIMES	49 8 8												
THIRTEEN TIMES	2 4												
FIFTEEN TIMES	6 1.1												
SEVENTEEN TIMES	1 .3												
EIGHTEEN TIMES	1 .1												
NINETEEN TIMES	1 1												
TWENTY TIMES	1 .3												
DON'T KNOW	5 9												
*MEAN	2 61	3											
STANDARD DEVIATION	3 71	4											
STANDARD ERROR	16												

TABLE 28
Q.21 NUMBER OF OCCASIONS WOULD LIKELY VISIT DURING A SEASON
BASE TOTAL RESPONDENTS

		SEX		AGE			MARR. STATUS		VANCOUVER		OUT-SIDE	INCOME	
	TOTAL	MALE	FE-MALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MAR-RIED	CORE	OUT-SIDE	METRO VAN	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-WEIGHTED	555 100.0	290 100.0	265 100.0	307 100.0	142 100.0	101 100.0	234 100.0	312 100.0	278 100.0	162 100.0	110 100.0	181 100.0	205 100.0

*MEAN EXCLUDES "DON'T KNOW" RESPONSES

TABLE 29
Q.22A,B,C,D,E,F BASIC DATA
BASE TOTAL RESPONDENTS

RJ405 CANADIAN FACTS

ABSOLUTES/COL %

		SEX		AGE			MARR. STATUS		VANCOUVER		OUT-SIDE	INCOME	
	TOTAL	MALE	FE-MALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MAR-RIED	CORE	OUT-SIDE	METRO VAN	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-ACTUAL	267 100.0	143 100.0	124 100.0	153 100.0	68 100.0	44 100.0	108 100.0	156 100.0	124 100.0	82 100.0	59 100.0	96 100.0	101 100.0
BASE FOR PERCENTAGES-WEIGHTED	555 100.0	290 100.0	265 100.0	307 100.0	142 100.0	101 100.0	234 100.0	312 100.0	278 100.0	162 100.0	110 100.0	181 100.0	205 100.0
SEX:													
MALE	290 52.2	290 100.0	0 0	173 56.3	51 36.3	60 60.0	143 61.2	142 45.5	138 49.5	98 60.1	52 47.2	106 58.8	107 52.1
FEMALE	265 47.8	0 0	265 100.0	134 43.7	90 63.7	40 40.0	91 38.8	170 54.5	140 50.5	65 39.9	58 52.8	75 41.2	98 47.9
AGE:													
20 TO 24 YEARS	140 25.2	88 30.5	51 19.4	140 45.5	0 0	0 0	123 52.3	17 5.5	87 31.3	30 18.3	23 20.9	48 26.8	42 20.2
25 TO 34 YEARS	167 30.2	85 29.3	83 31.2	167 54.5	0 0	0 0	65 27.9	100 32.0	68 24.4	70 43.1	30 27.0	54 29.6	88 42.8
35 TO 44 YEARS	79 14.2	27 9.3	52 19.7	0 0	79 55.8	0 0	11 4.8	68 21.8	44 15.8	21 12.8	14 12.8	19 10.7	38 18.5
45 TO 54 YEARS	63 11.3	25 8.5	38 14.3	0 0	63 44.2	0 0	9 3.8	54 17.2	34 12.1	13 7.8	16 14.9	19 10.7	21 10.2
55 TO 64 YEARS	51 9.1	26 9.0	25 9.3	0 0	0 0	51 50.3	12 5.1	39 12.4	23 8.3	18 11.0	10 8.8	17 9.5	15 7.3
65 YEARS OR OVER	50 9.0	34 11.9	16 5.9	0 0	0 0	50 49.7	14 6.1	34 10.8	18 6.5	11 6.9	16 14.9	23 12.8	2 1.1
REFUSED	5 .9	4 1.5	1 .3	0 0	0 0	0 0	0 0	1 .2	4 1.6	0 0	1 .7	0 0	0 0

ABSOLUTES/COL %

TABLE 29
Q 22A,B,C,D,E,F BASIC DATA
BASE TOTAL RESPONDENTS

		SEX		AGE			MARR STATUS		VANCOUVER		OUT-SIDE	INCOME	
	TOTAL	MALE	FE-MALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MAR-RIED	CORE	OUT-SIDE	METRO VAN	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-WEIGHTED	555 100.0	290 100.0	265 100.0	307 100.0	142 100.0	101 100.0	234 100.0	312 100.0	278 100.0	162 100.0	110 100.0	181 100.0	205 100.0
HOUSEHOLD SIZE:													
ONE PERSON	63 11.3	33 11.3	30 11.3	29 9.4	10 6.8	24 23.7	58 24.8	2 .7	39 13.9	10 6.0	12 10.8	33 18.1	9 4.3
TWO PEOPLE	140 25.3	80 27.6	60 22.8	66 21.6	25 17.4	49 48.9	48 20.7	90 28.7	77 27.6	36 22.0	25 23.0	57 31.3	53 25.7
THREE TO FOUR PEOPLE	256 46.2	129 44.5	128 48.0	142 46.2	91 64.2	23 23.0	82 35.2	174 55.8	111 39.9	92 56.9	53 48.0	66 36.6	108 52.6
FIVE PEOPLE AND OVER	91 16.3	44 15.1	47 17.7	70 22.7	16 11.5	4 4.4	45 19.3	45 14.6	47 16.9	25 15.1	19 17.5	25 14.0	36 17.3
REFUSED	5 .9	4 1.5	1 .3	0 0	0 0	0 0	0 0	1 .2	4 1.6	0 0	1 .7	0 0	0 0
MARITAL STATUS:													
SINGLE	198 35.8	136 46.9	63 23.6	181 59.0	10 6.8	7 7.4	198 84.7	0 0	118 42.6	54 33.0	27 24.2	70 38.6	79 38.7
MARRIED OR COMMON LAW	312 56.2	142 48.9	170 64.1	117 38.1	122 85.8	72 71.9	0 0	312 100.0	133 47.8	101 62.4	75 68.3	92 51.1	120 58.4
WIDOWED, DIVORCED OR SEPARATED	36 6.4	7 2.6	28 10.7	7 2.2	10 7.4	19 18.5	36 15.3	0 0	22 8.0	5 3.2	8 7.4	19 10.3	6 2.9
REFUSED	9 1.6	4 1.5	4 1.7	2 .7	0 0	2 2.2	0 0	0 0	4 1.6	2 1.4	0 0	0 0	0 0

ABSOLUTES/COL %

TABLE 29
Q 22A,B,C,D,E,F BASIC DATA
BASE TOTAL RESPONDENTS

		SEX		AGE			MARR STATUS		VANCOUVER		OUT-SIDE	INCOME	
	TOTAL	MALE	FE-MALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MAR-RIED	CORE	OUT-SIDE	METRO VAN	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-WEIGHTED	555	290	265	307	142	101	234	312	278	162	110	181	205
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
DISTRICT LIVE IN													
VANCOUVER CITY WEST OF MAIN	40	16	25	22	4	14	21	19	40	0	0	16	19
	7.3	5.4	9.3	7.0	3.2	14.1	8.9	6.2	14.5	0	0	9.1	9.4
VANCOUVER CITY EAST OF MAIN	64	42	22	47	13	4	42	22	64	0	0	22	19
	11.5	14.4	8.4	15.3	8.9	4.4	18.1	6.9	23.1	0	0	12.0	9.4
BURNABY	65	28	37	33	30	2	28	37	65	0	0	21	16
	11.7	9.8	13.8	10.7	21.1	2.2	12.1	11.7	23.4	0	0	11.6	7.6
SURREY	70	34	36	44	19	7	28	40	0	70	0	26	22
	12.6	11.8	13.5	14.3	13.1	7.4	11.7	12.9	0	43.1	0	14.4	10.9
COQUITLAM	10	7	4	10	0	1	5	5	0	10	0	2	4
	1.9	2.3	1.4	3.1	0	.7	2.2	1.7	0	6.4	0	1.2	2.2
NEW WESTMINSTER	14	2	12	11	3	0	12	2	14	0	0	4	6
	2.5	.8	4.5	3.6	2.1	0	5.1	.7	5.1	0	0	2.1	2.9
NORTH VANCOUVER CITY	24	19	4	12	5	7	12	12	24	0	0	10	6
	4.3	6.7	1.7	3.9	3.7	6.7	5.1	3.8	8.6	0	0	5.8	2.9
NORTH VANCOUVER DISTRICT/ MUNICIPALITY	30	15	15	18	5	7	10	19	30	0	0	7	22
	5.4	5.1	5.6	5.8	3.7	6.7	4.5	6.2	10.7	0	0	3.7	10.9
WEST VANCOUVER	4	3	1	3	1	0	4	0	4	0	0	4	0
	.7	1.0	.3	1.0	.5	0	1.6	0	1.3	0	0	2.1	0
RICHMOND	37	13	25	10	16	7	11	22	37	0	0	16	12
	6.7	4.4	9.3	3.1	11.6	6.7	4.8	6.9	13.4	0	0	8.7	5.8
DELTA	24	18	6	10	5	9	4	19	0	24	0	5	4
	4.3	6.2	2.2	3.1	3.7	8.9	1.9	6.2	0	14.7	0	2.9	2.2
LANGLEY	16	10	6	15	1	0	7	9	0	16	0	3	12
	2.9	3.6	2.2	4.8	1.0	0	3.2	2.9	0	10.1	0	1.6	5.8
WHITE ROCK	22	15	7	6	4	12	7	15	0	22	0	3	6
	4.0	5.1	2.8	1.9	3.2	11.8	3.2	4.8	0	13.8	0	1.6	2.9
PORT COQUITLAM	14	11	3	11	3	0	7	7	0	14	0	4	7
	2.6	3.9	1.1	3.6	2.1	0	2.9	2.4	0	8.7	0	2.5	3.6
PORT MOODY	5	2	3	4	1	0	0	5	0	5	0	0	5
	.9	.8	1.1	1.5	.5	0	0	1.7	0	3.2	0	0	2.5

TABLE 29
Q 22A, B, C, D, E, F BASIC DATA
BASE TOTAL RESPONDENTS

		SEX		AGE			MARR STATUS		VANCOUVER		OUT-SIDE	INCOME	
	TOTAL	MALE	FE-MALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MAR-RIED	CORE	OUT-SIDE	METRO VAN	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-WEIGHTED	555	290	265	307	142	101	234	312	278	162	110	181	205
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
ABBOTSFORD/CLEARBROOK	1	1	0	0	0	1	1	0	0	0	1	1	0
	.1	3	0	0	0	7	3	0	0	0	.7	4	0
MISSION/ALDERGROVE	3	1	2	1	2	0	0	3	0	0	3	3	0
	.5	.3	.8	2	1.6	0	0	1.0	0	0	2.7	1.6	0
CHILLIWACK/SARDIS	63	29	34	30	19	14	25	38	0	0	63	13	32
	11.4	10.0	12.9	9.7	13.1	14.1	10.8	12.2	0	0	57.4	7.0	15.6
AGASSIZ/ROSEDALE	18	12	6	6	7	4	4	13	0	0	18	7	4
	3.2	4.1	2.2	1.9	5.3	4.4	1.9	4.3	0	0	16.2	3.7	2.2
HANEY/MAPLE RIDGE	23	10	13	14	2	7	4	19	0	0	23	13	7
	4.2	3.3	5.1	4.6	1.6	6.7	1.9	6.0	0	0	21.0	7.0	3.3
NORTH BEND	2	0	2	2	0	0	0	2	0	0	2	2	0
	4	0	.8	.7	0	0	0	.7	0	0	2.0	1.2	0
REFUSED	4	2	2	0	0	4	0	2	0	0	0	0	0
	.8	.8	.8	0	0	4.4	0	.7	0	0	0	0	0

TABLE 29
Q 22A,B,C,D,E,F BASIC DATA
BASE TOTAL RESPONDENTS

		SEX		AGE			MARR STATUS		VANCOUVER		OUT-SIDE	INCOME	
	TOTAL	MALE	FE-MALE	18-34 YEARS	35-54 YEARS	55 OR OLDER	SINGLE	MAR-RIED	CORE	OUT-SIDE	METRO VAN	UNDER $30 M	$30 M OVER
BASE FOR PERCENTAGES-WEIGHTED	555 100.0	290 100.0	265 100.0	307 100.0	142 100.0	101 100.0	234 100.0	312 100.0	278 100.0	162 100.0	110 100.0	181 100.0	205 100.0
HOUSEHOLD INCOME:													
UNDER $30,000	181 32.6	106 36.8	75 28.1	102 33.2	39 27.4	40 40.0	89 37.8	92 29.7	99 35.7	44 27.0	38 34.5	181 100.0	0 0
UNDER $10,000	15 2.7	10 3.6	4 1.7	7 2.4	3 2.1	4 4.4	10 4.1	5 1.7	7 2.4	4 2.8	4 3.4	15 8.2	0 0
$10,000 TO $14,999	46 8.3	21 7.2	25 9.6	21 6.8	12 8.4	13 13.3	25 10.8	21 6.7	30 10.7	10 6.0	7 6.1	46 25.6	0 0
$15,000 TO $19,999	35 6.3	21 7.2	14 5.3	25 8.3	4 3.1	5 5.2	19 8.0	16 5.3	21 7.5	6 3.6	8 7.4	35 19.3	0 0
$20,000 TO $24,999	48 8.6	33 11.3	15 5.6	25 8.0	10 6.8	13 13.3	24 10.1	24 7.7	24 8.6	16 9.6	8 7.4	48 26.3	0 0
$25,000 TO $29,999	24 4.3	16 5.6	7 2.8	16 5.1	7 4.7	1 1.5	6 2.5	18 5.7	15 5.3	1 .5	8 7.4	24 13.1	0 0
REFUSED	5 .9	3 1.0	2 .8	3 1.0	0 0	2 2.2	3 1.3	2 .7	2 .8	3 1.8	0 0	5 2.9	0 0
DON'T KNOW	8 1.5	2 .8	6 2.2	5 1.7	3 2.1	0 0	2 .9	6 1.9	1 .3	4 2.8	3 2.7	8 4.5	0 0
$30,000 OR OVER	205 37.0	107 37.0	98 37.1	129 42.1	59 41.6	17 17.0	85 36.5	120 38.5	101 36.2	62 38.1	43 39.2	0 0	205 100.0
$30,000 TO $34,999	74 13.3	37 12.8	37 13.8	57 18.6	10 6.8	7 6.7	33 14.3	40 12.9	44 15.8	19 11.5	11 10.1	0 0	74 35.9
$35,000 TO $39,999	31 5.5	13 4.4	18 6.7	9 2.9	18 12.6	4 3.7	10 4.1	21 6.7	12 4.3	7 4.1	12 10.8	0 0	31 14.8
$40,000 TO $49,999	48 8.6	25 8.8	22 8.4	34 10.9	7 5.3	7 6.7	21 8.9	27 8.6	29 10.5	7 4.6	11 10.2	0 0	48 23.2
$50,000 TO $59,999	19 3.5	7 2.6	12 4.5	7 2.4	12 8.4	0 0	4 1.9	15 4.8	7 2.7	9 5.5	3 2.7	0 0	19 9.4
$60,000 OR MORE	12 2.1	12 4.1	0 0	9 2.9	3 2.1	0 0	10 4.4	1 .5	4 1.3	4 2.7	4 3.4	0 0	12 5.7
REFUSED	8 1.5	4 1.5	4 1.4	0 0	8 5.8	0 0	0 0	8 2.6	4 1.6	4 2.3	0 0	0 0	8 4.0
DON'T KNOW	14 2.5	8 2.8	6 2.2	13 4.4	1 .5	0 0	7 2.9	7 2.4	0 0	12 7.4	2 2.0	0 0	14 6.9
REFUSED INCOME	113 20.4	48 16.5	66 24.7	28 9.0	40 27.9	41 40.8	19 8.0	86 27.5	52 18.A	41 25.3	16 14.7	0 0	0 0
DON'T KNOW INCOME	55 9.9	28 9.7	27 10.1	48 15.7	4 3.1	2 2.2	42 17.A	13 4.3	26 9.4	16 9.6	13 12.1	0 0	0 0

TABLE 30
Q.22A,B,C,D,E,F BASIC DATA
BASE TOTAL RESPONDENTS

	TOTAL ACTUAL	TOTAL WEIGHTED
BASE FOR PERCENTAGES-ACTUAL	267 100.0	267 100.0
BASE FOR PERCENTAGES-WEIGHTED	267 100.0	555 100.0
SEX:		
MALE	143 53.6	290 52.2
FEMALE	124 46.4	265 47.8
AGE:		
20 TO 24 YEARS	60 22.5	140 25.2
25 TO 34 YEARS	93 34.8	167 30.2
35 TO 44 YEARS	43 16.1	79 14.2
45 TO 54 YEARS	25 9.4	63 11.3
55 TO 64 YEARS	23 8.6	51 9.1
65 YEARS OR OVER	21 7.9	50 9.0
REFUSED	2 .7	5 .9

TABLE 30
Q 22A, B, C, D, E, F BASIC DATA
BASE TOTAL RESPONDENTS

	TOTAL ACTUAL	TOTAL WEIGHTED
BASE FOR PERCENTAGES-WEIGHTED	267 100.0	555 100.0
HOUSEHOLD SIZE		
ONE PERSON	38 14.2	63 11.3
TWO PEOPLE	71 26.6	140 25.3
THREE TO FOUR PEOPLE	113 42.3	256 46.2
FIVE PEOPLE AND OVER	43 16.1	91 16.3
REFUSED	2 .7	5 .9
MARITAL STATUS		
SINGLE	89 33.3	198 35.8
MARRIED OR COMMON LAW	156 58.4	312 56.2
WIDOWED, DIVORCED OR SEPARATED	19 7.1	36 6.4
REFUSED	3 1.1	9 1.6

TABLE 30
Q.22A,B,C,D,E,F BASIC DATA
BASE TOTAL RESPONDENTS

	TOTAL ACTUAL	TOTAL WEIGHTED
BASE FOR PERCENTAGES-WEIGHTED	267 100.0	555 100.0
DISTRICT LIVE IN:		
VANCOUVER CITY WEST OF MAIN	22 8.2	40 7.3
VANCOUVER CITY EAST OF MAIN	27 10.1	64 11.5
BURNABY	21 7.9	65 11.7
SURREY	34 12.7	70 12.6
COQUITLAM	6 2.2	10 1.9
NEW WESTMINSTER	9 3.4	14 2.5
NORTH VANCOUVER CITY	12 4.5	24 4.3
NORTH VANCOUVER DISTRICT/ MUNICIPALITY	14 5.2	30 5.4
WEST VANCOUVER	3 1.1	4 .7
RICHMOND	16 6.0	37 6.7
DELTA	12 4.5	24 4.3
LANGLEY	10 3.7	16 2.9
WHITE ROCK	11 4.1	22 4.0
PORT COQUITLAM	6 2.2	14 2.6
PORT MOODY	3 1.1	5 .9

TABLE 30
Q.22A,B,C,D,E,F BASIC DATA
BASE TOTAL RESPONDENTS

	TOTAL ACTUAL	TOTAL WEIGHTED
BASE FOR PERCENTAGES-WEIGHTED	267 100.0	555 100.0
ABBOTSFORD/CLEARBROOK	1 .4	1 .1
MISSION/ALDERGROVE	2 .7	3 .5
CHILLIWACK/SARDIS	34 12.7	63 11.4
AGASSIZ/ROSEDALE	9 3.4	18 3.2
HANEY/MAPLE RIDGE	12 4.5	23 4.2
NORTH BEND	1 .4	2 .4
REFUSED	2 .7	4 .8

TABLE 30
Q.22A,B,C,D,E,F BASIC DATA
BASE TOTAL RESPONDENTS

	TOTAL ACTUAL	TOTAL WEIGHTED
BASE FOR PERCENTAGES-WEIGHTED	267	555
	100.0	100.0
HOUSEHOLD INCOME		
UNDER $30,000	96	181
	36.0	32.6
UNDER $10,000	7	15
	2.6	2.7
$10,000 TO $14,999	20	46
	7.5	8.3
$15,000 TO $19,999	19	35
	7.1	6.3
$20,000 TO $24,999	24	48
	9.0	8.6
$25,000 TO $29,999	17	24
	6.4	4.3
REFUSED	3	5
	1.1	.9
DON'T KNOW	6	8
	2.2	1.5
$30,000 OR OVER	101	205
	37.8	37.0
$30,000 TO $34,999	33	74
	12.4	13.3
$35,000 TO $39,999	19	31
	7.1	5.5
$40,000 TO $49,999	19	48
	7.1	8.6
$50,000 TO $59,999	10	19
	3.7	3.5
$60,000 OR MORE	9	12
	3.4	2.1
REFUSED	4	8
	1.5	1.5
DON'T KNOW	7	14
	2.6	2.5
REFUSED INCOME	47	113
	17.6	20.4
DON'T KNOW INCOME	23	55
	8.6	9.9

APPENDIX

CANADIAN FACTS
VANCOUVER
RJ405

NO. FEMALES LISTED 8 -

Hello. This is ____________________________ of Canadian Facts, a marketing research company. We are doing a survey on sports and recreation, and I would like to ask you a few questions.

A. Is there anybody in your household who works for a company associated with advertising, public relations, media, or in sports or recreation occupations?

YES .... **END INTERVIEW AND ERASE**

NO .... **CONTINUE**

B. So that I can find out whom I should be interviewing in this household, and because I have to alternate interviews with males and females, I'd like you to tell me how many women 18 years of age or older live in this household.

TOTAL NUMBER OF ELIGIBLE FEMALES: ____________

(IF NO ELIGIBLE FEMALES IN HOUSEHOLD, USE A MALE VERSION QUESTIONNAIRE)

TO DETERMINE THE FEMALE TO BE INTERVIEWED, CIRCLE THE NUMBER IN THE COLUMN THAT CORRESPONDS WITH THE NUMBER OF FEMALES IN THE HOUSEHOLD AND ASK TO SPEAK TO THE DESIGNATED INDIVIDUAL.

TOTAL NUMBER OF FEMALES ____________ (SPECIFY EXACT NO.)	
1.	The person
2.	Youngest
3.	Youngest
4.+	Youngest

PATTERN NO. ___1___

(IF SELECTED INDIVIDUAL NOT AVAILABLE, ARRANGE CALLBACK)

MAIN QUESTIONNAIRE

1. Have you ever watched or participated in any motorsport related events, shows or meets?

YES	9-1	SKIP TO Q.3
NO	2	

2. Overall, how interested are you in watching or participating in motorsports, car racing, car shows and so forth? Are you ... (READ LIST)

Very Interested	10-1	
Somewhat Interested	2	
Not Very Interested	3	SKIP TO Q.17
Not At All Interested	4	
DON'T KNOW	5	

3. Have you done any of these things in the past 2 years? (READ LIST)(CHECK ALL THAT APPLY)

	YES	NO
▲ Watched A Motorsport Event Or Show On Television	11-1	☐
● Attended A Motorsport Event Or Show In Person	2	☐
■ Been A Participant In A Motorsport Event Or Show	3	☐
NONE OF THE ABOVE		4 SKIP TO Q.17

ASK Q.4 ▲, ●, ■ IF RESPONDENT ANSWERED YES IN Q.3 ▲, ●, ■.
(START WITH EVENT MARKED WITH A ✓)

▲ 4.a) Which of the following motorsport events have you watched on T.V. over the past 2 years?

● b) Which ones have you attended in person in the past 2 years?

● c) What was the last event you went to in person? **(RECORD ONLY ONE ANSWER HERE)**

■ d) Which events have you participated in the past 2 years?

■ e) Which events do you participate in now on a regular basis? **(RECORD ALL THAT APPLY)**

Motorsport Event **(ROTATE ORDER)**	▲ Q.4(a) Watched On T.V.	● Q.4(b) Have Attended	● Q.4(c) Last Event	■ Q.4(d) Ever Part'd	■ Q.4(e) Part'e Now
☑ Auto Racing On A Road Course	12-1	14-1	16-1	18-1	20-1
Drag Racing	2	2	2	2	2
Oval Track Racing	3	3	3	3	3
Motorcycle Racing	4	4	4	4	4
☐ Go-Kart Racing	5	5	5	5	5
Demolition Derbies	6	6	6	6	6
Motocross	7	7	7	7	7
Ice Racing	8	8	8	8	8
Gymkhana Or Slalom Race ..	9	9	9	9	9
☐ Tractor-Pulls	0	0	0	0	0
A Hill Climb Race	13-1	15-1	17-1	19-1	21-1
Road Rally	2	2	2	2	2
Four-Wheeler Drive Event .	3	3	3	3	3
Motor Boat Racing	4	4	4	4	4
Other (Specify)	________ ________	________ ________	________ ________	________ ________	________ ________
NONE OF THE ABOVE	9	9	9	9	9
		SKIP TO Q. 17			

I'd like you to now think back to the **last motorsport event** you attended in person either as a spectator or as a participant. **(REFER TO Q.4 FOR NAME OF THE EVENT)**

5. Were you primarily a spectator or a participant in this event?

Spectator 22-1
Participant 2

6. How **long ago** did you attend that event?

1 - 2 Months Ago 23-1
3 - 5 Months Ago 2
6 - 8 Months Ago 3
9 - 11 Months Ago 4
1 Year Ago 5
More Than A Year Ago 6
DON'T KNOW 7

7. Where was this event held?

Vancouver City 24-1
Coquitlam 2
Langley 3
Mission 4
Aggasiz (Kent) 5
Other B.C. **(SPECIFY)** ________________ 25-
26-
Outside of B.C. **(SPECIFY)** ________________ 27-
28-

8.a) What means of transportation did you take to get to the event?

Car 29-1
Truck, Van Or Motorhome 2
Motorcycle 3
Train 4
Plane 5
Other **(Specify)** ________________ 6

SKIP TO Q.9

30-

8.b) What is the approximate travel time by road from your home to where this event was held? **(OBTAIN AN ESTIMATE EITHER IN MINUTES OR HOURS)**

________________ **Minutes** 31/32-
Or
________________ **Hours** 33-

9. With whom did you go to this event? **(READ LIST)**

Self Only	34-1 **SKIP TO Q.11**
Self And Friend(s)	2
Self And Family	3
Other .... **(SPECIFY)** ________________	4

10. How many persons including yourself attended this event with you?

One	35-1	Six	6
Two	2	Seven	7
Three	3	Eight	8
Four	4	Nine	9
Five	5	More Than Nine People	0

(PROBE FOR EXACT NUMBER)
________36/37-

11.a) How long was this event on for? Was it a ...... **(READ LIST)** ..... event?

b) And, how long did you (and your group) stay at this event. Did you stay a .... **(READ LIST)**

	Q.11(a) Length	Q.11(b) Stayed
Half-Day	38-1	39-1
One Full Day	2	2
Two Days	3	3
Three Days	4	4
Four Days	5	5
Five Days	6	6
More Than Five Days	7	7
DON'T KNOW/CAN'T RECALL	8	8

12. Approximately how many dollars in total did you (and your group) spend at that motorsport event including parking, admission and refreshments?

$____________.00   40/42-

13. What is your **favourite competitive** motorsport event, that is; the **one** event you would like to attend or participate in **most**? **(DO NOT READ LIST)**

Auto Racing On A Road Course	43-1
Drag Racing	2
Oval Track Racing	3
Motorcycle Racing	4
Go-Kart Racing	5
Tractor-Pulls	6
Demolition Derbies	7
A Hill Climb Race	8
Motocross	9
Road Rally	0
Four-Wheeler Drive Event	44-1
Gymkhana or Slalom Race	2
Motor Boat Racing	3
Ice Racing	4
Other **(SPECIFY)** ____________________	45-
________________________________	46-

14.a) Which of the following non-competitive motorsport events have you attended as a participant or spectator? **(READ LIST)**

b) Which one was the last one you were at? **(RECORD ONE ONLY)**

	Q.14(a)	Q.14(b)
Auto Show	47-1	48-1
Custom Car Show	2	2
Auto Swap Meet	3	3
Auto Club Picnic Or Rally	4	4
Show & Shine	5	5
Parades	6	6
Other **(SPECIFY)** ____________________		
________________________________		7

15. Which of these Lower Mainland area motorsport facilities have you ever been to? **(CHECK ALL THAT APPLY)(READ LIST)**

Westwood Park	49-1
Action Raceway	2
Mission Raceway	3
Kent Raceway	4
None	5
Other **(Specify)** ______________	6
______________________________	

16. **(START WITH STATEMENT MARKED ✓)** How important are each of these factors in your decision to attend a competitve motorsport event?
For each factor I would like you to tell me whether you feel it is "Very Important", "Somewhat Important", "Neither Important Nor Unimportant" or "Not At All Important".
How important is it that ...

ROTATE		Very Important	Somewhat Important	Neither	Somewhat Unimportant	Not At All Important	Don't Know
☐	...the event be a locally sponsored event	50-1	2	3	4	5	6
	...the event be of a National calibre	51-1	2	3	4	5	6
	...the event feature well known drivers and teams	52-1	2	3	4	5	6
☑	...the event be close enough to where I live to make attendance a day trip	53-1	2	3	4	5	6
	...the event be in a world class facility	54-1	2	3	4	5	6
	...the event be held each and every year	55-1	2	3	4	5	6
	...the admission price be comparable to a movie show or other similar entertainment	56-1	2	3	4	5	6

17. How many people in your household, **other than yourself**, have attended or participated in a motorsport related event or show in the past 2 years?

_________________ people 57-

18. Plans are being made to consider building a multi-use motorsport facility in the Lower Mainland east of the Port Mann bridge. This facility would include a road racing circuit, an oval track, a paved drag strip and possibly other courses for four-by-four or motocross.

How likely would you be to attend a motorsport facility like this?

Very Likely 58-1

Somewhat Likely 2

Somewhat Unlikely 3

Not At All Likely 4

DON'T KNOW 5

19. What kinds of competitive events would you like to see offerred in the facility I just described?

____ 59-

____ 60-

20. What kinds of non-competitive shows and events would you like to see in that facility?

____ 61-

____ 62-

21. This facility would have events going on from May to October. If events were held on twenty occasions in this facility, how many of the 20 would you be most likely to attend in a season? (RECORD EXACT NUMBER)

______________ EVENTS 63/64-

BASIC DATA:

22.a) SEX: (OBSERVE)

MALE 65-1

FEMALE 2

b) Which of the following age categories can I put you into? (READ LIST)

.................66-1] Blank

.... 2]

20 To 24 Years 3

25 To 34 Years 4

35 To 44 Years 5

45 To 54 Years 6

55 To 64 Years 7

65 Years Or Over 8

REFUSED 9

c) How many people, including adults and children, are there living in your household?

ONE 67-1

TWO 2

THREE TO FOUR 3

FIVE AND OVER 4

REFUSED 5

d) And, what is your marital status? Are you -

Single 68-1

Married Or Common Law 2

Widowed, Divored Or Separated . 3

REFUSED 4

e) In what community or Lower Mainland district do you live in?

METRO VANCOUVER

Vancouver City West Of Main 69-1

Vancouver City East Of Main 2

Burnaby 3

Surrey 4

Coquitlam 5

New Westminster 6

North Vancouver City 7

North Vancouver District/Municipality 8

West Vancouver 9

Richmond 0

Delta 70-1

Langley 2

White Rock 3

Port Coquitlam 4

Port Moody 5

Other **(Specify)** ______________________________

OUTSIDE AREAS:

Abbotsford/Clearbrook 71-1

Mission/Aldergrove 2

Chilliwack/Sardis 3

Aggassiz/Rosedale 4

Haney/Maple Ridge 5

Other **(Specify)** ______________________________

f) Into which of the following broad categories does your total annual family income fall; that is, the total income before tax from all members in your family? Would it be $30,000 or more, or would it be under $30,000 per year?

Under $30,000	72-1	$30,000 or over	2
Is that:		Is that:	
Under $10,000	3	$30,000 to $34,999	8
$10,000 to $14,999	4	$35,000 to $39,999	9
$15,000 to $19,999	5	$40,000 to $49,999	0
$20,000 to $24,999	6	$50,000 to $59,999	73-1
$25,000 to $29,999	7	$60,000 or more	2

REFUSED 3

DON'T KNOW 4

Thank you for your cooperation.

INTERVIEWER: ______________________ DATE: ______________

TELEPHONE NO: ____________________

RESPONDENT'S FIRST NAME: ____________________

74/75 Blank
76/80 RJ405

Appendix F

MARKET RESEARCH OF LOWER MAINLAND PARTICIPANTS

Appendix F

MARKET RESEARCH OF LOWER MAINLAND PARTICIPANTS

This appendix includes detailed data and results pertaining to the research survey conducted of motorsport event participants and users of existing Lower Mainland facilities.

A. SURVEY APPROACH

The objective of this part of the work was to obtain specific data concerning motorsport participants in the Lower Mainland in terms of the extent and nature of their involvement and their spending characteristics. This survey was also believed to be one of the only reliable methods available to obtain an understanding of the extent to which motorsport enthusiasts spend money in the United States to obtain parts, supplies and services not available in Canada.

To undertake the survey, a questionnaire was developed which addressed the issues and questions on concern. Specific questions were designed in a manner similar to those in the questionnaire for Lower Mainland resident research to facilitate comparisons during this study and in the future.

Telephone interviews were used to complete the questionnaires during January, 1985. Most contacts were made in the evening or on the weekend.

The base line used to select individuals to be contacted comprised the individual membership lists of the Lower Mainland Oval Racing Association (LMORA), the B.C. Custom Car Association (BCCCA) and the Sports Car Club of B.C. (SCCBC). Names were selected at random from these lists to provide a representative sampling of all participants. A total of 18 telephone interviews were successfully completed.

Since some questions on the participant questionnaire were considered to be confidential in nature, interviewers stressed that the names and telephone numbers of respondents would be discarded following the interview. This has been carried out so that no record exists of answers provided by individual respondents. Such a process was considered to be important by both the Steering Committee and the Consulting Team to ensure that an adequate response rate to all questions could be achieved. Since this required response was, indeed. achieved it is evident that the confidentiality process was worthwhile.

B. PARTICIPANT SURVEY QUESTIONNAIRE

The questionnaire used to undertake the participant survey is included in the following four pages.

LOWER MAINLAND MOTORSPORT CENTRE
ECONOMIC AND MARKET STUDY

MOTORSPORT FACILITY USER QUESTIONNAIRE

Person Interviewed:	________________	Interviewer:	________________
Telephone No.:	________________	Date:	________________

Contact Management:	No answer	Call back Date/time:	____________
	Respondent not in		
	Call at work	No.:	________

Hello. This is _________ from Thorne Stevenson & Kellogg. We are carrying out a survey of motorsport facility users on behalf of the B.C. Association of Motorsport Facilities and the Provincial Government which you may be aware of.

Could we take about ten minutes of your time to ask a few questions about your involvement in motorsport?

Refused	No time/No call-back potential

This survey is oriented towards individuals, families and groups who currently make use of motorsport facilities or could in the future. It will provide us with basic information on such things as what type of involvement you have, how often you become involved and how much money you spend on these activities.

A number of questions may be considered somewhat confidential. To ensure that total confidentiality is ensured, we will be disposing of your name and telephone number as soon as we complete this questionnaire.

- -

DISCARD TOP PART OF THIS PAGE

1. What motorsport club or clubs are you a member of?

   ______________________ ______________________

2. What motorsport facilities in the Lower Mainland and in the U.S. have you made use of or visited?

Action Raceway	☐	United States (specify)	☐
Mission Raceway	☐	(i) ________________	
Westwood Motorsport Park	☐	(ii) ________________	
		(iii) ________________	

3. How many people in your household participate in motorsport activity?

Self only	☐	Four	☐
Two	☐	Five	☐
Three	☐	More than five	☐

4. Which of the following categories best describes the nature of both your primary and secondary (...if applicable...)involvement in motorsport?

Spectator	☐	Competitive event participant (driver/crew)	☐
Organizer	☐	Non-competitive event participant (eg. swap meets, show-'n-shines, picnics)	☐
Tract/event worker	☐		

5. Over the past year (...i.e. last season...), during how many days were you involved in motorsport events or activities held in the Lower Mainland or in the United States?

	Lower Mainland	United States		Lower Mainland	United States
1 day	☐	☐	6-8 days	☐	☐
2 days	☐	☐	8-10 days	☐	☐
3 days	☐	☐	10-12 days	☐	☐
4 days	☐	☐	12-15 days	☐	☐
5 days	☐	☐	More than 15 days	☐	☐

6. What principal types of event(s) in the Lower Mainland and the U.S. do you generally become involved in?

	L.M.	U.S.		L.M.	U.S.
Auto racing/road course	☐	☐	Tractor pulls	☐	☐
Drag racing	☐	☐	Hill climbs	☐	☐
Oval track racing	☐	☐	Road rally	☐	☐
Motorcycle road racing	☐	☐	Four wheel drive event	☐	☐
Go-kart racing	☐	☐	Motor boat racing	☐	☐
Demolition derbies	☐	☐	Swap meets	☐	☐
Motocross	☐	☐	Show-'n-Shines	☐	☐
Ice racing	☐	☐	Picnics	☐	☐
Gymkhana or Slalom	☐	☐	Other (specify)	☐	☐
			____________________		

7. With whom do you generally go to these events?

- Self only ☐
- Self and friends ☐ .... How many including you? ____
- Self and family ☐ .... How many including you? ____
- Other (specify) ☐
- ____________________ .... How many including you? ____

8a. How long do you typically spend at events you become involved with in the Lower Mainland?

Half day	☐	Three days	☐
One full day	☐	More than three days	☐
Two days	☐	Don't know/can't recall	☐

8b. **(IF APPLICABLE)**

How long do you typically spend away from home when you attend events in the United States?

	At the event	Extra time away		At the event	Extra time away
Half day	☐	☐	Three days	☐	☐
One full day	☐	☐	More than three	☐	☐
Two days	☐	☐	Don't know/ can't recall	☐	☐

9. Approximately how many dollars did you spend (.. or did you and your group spend per person...) at a typical event last year (...including parking, admission/entry, refreshments, entertainment, auto supplies/fuel bought at the event, etc.)?

	L.M. events	U.S. events		L.M. events	U.S. events
Less than $20	☐	☐	$100-200	☐	☐
$20-50	☐	☐	$200-300	☐	☐
$50-100	☐	☐	More than $300	☐	☐

FOR DRIVERS OR CREW ONLY

10a. How many total dollars do you (.. or your team and/or sponsor) spend annually on parts, supplies, services, travel, fuel, entry fees, tires, etc. to support your competitive involvement?

Less than $200	☐	$2,000-5,000	☐
$200-500	☐	$5,000-10,000	☐
$500-1,000	☐	More than $10,000	☐
$1,000-2,000	☐	Don't know	☐

b. Approximately what proportion of this annual expenditure is spent to purchase parts, equipment, services, etc. directly from U.S. based firms.

________%

c. What are your principal types of purchases made directly from U.S. based firms?

(i) ____________________

(ii) ____________________

(iii) ____________________

FOR NON-COMPETING PARTICIPANTS ONLY

11. How many dollars per person do you and those who attend with you spend annually on your involvement in motorsport activities and events? (e.g. car/motorcycle preparation, purchases at swap meets, travel, entertainment, equipment, etc.)

Less than $50 ☐
$50-100 ☐
$100-150 ☐
$150-200 ☐

$200-300 ☐
$300-500 ☐
$500-1,000 ☐
More than $1,000 ☐
Don't know ☐

ALL RESPONDENTS

12. The construction of a multi-use motorsport facility is being considered on the Lower Mainland. This facility would include a road racing circuit, an oval track, a paved drag strip and possibly other facilities such as an off-road course and a motocross track.

Should the facility be developed and stage a variety of competitive and non-competitive motorsport activities, would you participate in more or fewer activities than you do at present?

Fewer ☐
About the same ☐
Several more per year ☐
Substantially more per year ☐
Don't know/uncertain ☐

13. Should this new motorsport centre be developed in Southwestern B.C., what is the limit of how far you would travel before your level of participation would decrease?

Less than 10 miles ☐
10-20 miles ☐
20-40 miles ☐
40-60 miles ☐
60-80 miles ☐
More than 80 miles ☐

BASIC DATA

14a. Sex of respondent (Observe) Male ☐ Female ☐

b. Which of the following age categories can I put you into?

12-14 years ☐
15-19 years ☐
20-24 years ☐
25-34 years ☐

35-44 years ☐
45-54 years ☐
55-64 years ☐
65 years or over ☐
Refused ☐

c. How many people, including adults and children, are there living in your household?

One ☐
Two ☐
Three to four ☐
Five or more ☐
Refused ☐

d. What is your marital status?

Single ☐
Married or common law ☐

Widowed/divorced/separated ☐
Refused ☐

14e. In what community or Lower Mainland district do you live in?

METRO VANCOUVER

Vancouver City, west of Main ☐
Vancouver City, east of main ☐
Burnaby ☐
Surrey ☐
Coquitlam ☐
New Westminster ☐
North Vancouver City ☐
North Vancouver District/ Municipality ☐

West Vancouver ☐
Richmond ☐
Delta ☐
Langley ☐
White Rock ☐
Port Coquitlam ☐
Port Moody ☐
Other (specify) ☐ ____________________

OUTSIDE AREAS

Abbotsford/Clearbrook/Aldergrove ☐
Chilliwack/Sardis ☐

Aggassiz/Rosedale ☐
Mission/Haney/Maple Ridge ☐
Other (specify) ☐ ____________________

f. Into which of the following broad categories does your total annual family income fall; that is, the total income before taxes from all members in your family?

Would it be $30,000 or more, or would it be under $30,000 per year?

Under $30,000

Is that:

Under $10,000 ☐
$10,000 to $14,999 ☐
$15,000 to $19,999 ☐
$20,000 to $24,999 ☐
$25,000 to $29,999 ☐

$30,000 or over

Is that:

$30,000 to $34,999 ☐
$35,000 to $39,999 ☐
$40,000 to $49,999 ☐
$50,000 to $59,999 ☐
$60,000 or more ☐

Refused ☐
Don't know ☐

THAT'S ALL OF OUR QUESTIONS. THANK YOU FOR YOUR CO-OPERATION

C. LOWER MAINLAND MOTORSPORT PARTICIPANT SURVEY RESULTS

Question 1. Membership in motorsport clubs

	No. of Respondents	Percentage	
TOTAL	48	100	
		Percentage of Respondents	Percentage of Respondents
· B.C. Custom Car Association	3	6.3	5.2
· Lower Mainland Oval Racing Ass'n.	16	33.3	27.6
· Sports Car Club of B.C.	24	50.0	41.4
· Other	12	25.0	20.7
· None	3	6.3	5.2
			100

Question 2. Motorsport facilities visited or utilized

	No. of Respondents	Percentage	
TOTAL	48	100	
		Percentage of Respondents	Percentage of Respondents
CANADA			
· Action Raceway	36	75.0	36.04
· Mission Raceway	20	41.7	20.2
· Westwood Motorsport Park	35	72.9	35.4
· Other B.C.	5	10.4	5.1
· Other Canada	3	6.3	3.0
			100
UNITED STATES			
· Seattle (S.I.R.)	22	45.8	20.8
· Portland (P.I.R.)	24	50.0	22.2
· Skagit	10	20.8	9.3
· Other U.S.	52	N/A	48.1
			100

Question 3. Household participation in motorsport activity

	No. of Respondents	Percentage
• TOTAL	48	100
• Self only	16	33.3
• Two	16	33.3
• Three	6	12.5
• Four	6	12.5
• Five	4	8.3
• More than five	0	0
		100

Question 4. Type of primary and secondary involvement in motorsport

	No. of Respondents	Percentage	
• TOTAL	48	100	
	No. of Responses	Percentage of Respondents	Percentage of Respondents
• Spectator	37	77.1	39.4
• Organizer	6	12.5	6.4
• Track/event worker	7	14.6	7.4
• Competitive event Participant (driver/crew)	43	89.6	45.7
• Non-competitive event participant	1	2.1	1.1
			100

Question 5. Extent of involvement in motorsport events and activities

	No. of Respondents	Percentage
· TOTAL	48	100
LOWER MAINLAND		
· Less than 6 days	6	12.5
· 6 - 8 days	5	10.4
· 8 - 15 days	4	8.3
· More than 15 days	33	68.8
		100
UNITED STATES		
· None	14	29.2
· 1 - 4 days	14	29.2
· 5 - 15 days	11	22.9
· More than 15 days	9	18.8
		100

Question 6. Type of involvement in motorsport events

	No. of Respondents	Percentage	
· TOTAL	48	100	
LOWER MAINLAND	No. of Responses	Percentage of Respondents	Percentage of Respondents
· Auto road racing	28	58.3	28.3
· Drag racing	6	12.5	6.1
· Oval track racing	23	47.9	23.2
· Motorcycle road racing	7	14.6	7.1
· Gymkhana or slalom	4	8.3	4.0
· Hill climbs	5	10.4	5.1
· Other competitive events	17	35.4	17.2
· Non-competitive events	9	18.8	9.1
			100
UNITED STATES			
· Auto road racing	28	58.3	40.6
· Drag racing	7	14.6	10.1
· Oval track racing	16	33.3	23.2
· Other competitive events	9	18.8	9.0
· Non-competitive events	2	4.2	2.9
· No involvement	7	14.6	10.1
			100

Question 7. Who attends events with participant

	No. of Respondents	Percentage	Percentage of Respondents
• TOTAL	48	100	
• Self only	3		4.8
• Self and friends Avg. group size = 5.8	31		50.0
• Self and family Avg. group size = 4.3	28		45.2
			100

Question 8.(a) Time spent at events on the Lower Mainland

	No. of Respondents	Percentage
• TOTAL	48	100
• Half day	4	8.3
• One full day	17	35.4
• Two days	23	47.9
• Three days	4	8.3
		100

Question 8.(b) Time spent away at events in the United States

	No. of Respondents	Percentage
• TOTAL	48	100
AT THE EVENT		
• Half day	0	-
• One full day	6	12.5
• Two days	22	45.8
• Three days	10	20.8
• More than three days	4	8.3
• Do not go to the U.S.	6	12.5
		100

Question 9. Expenditures at events

	No. of Respondents	Percentage
• TOTAL	47	100
LOWER MAINLAND EVENTS		
• Less than $20	8	17.0
• $20 - $50	18	38.3
• $50 - $100	14	29.8
• $100 - $200	7	14.9
• More than $200	-	-
		100
• Avg. Exp. per Lower Mainland event = $90		
• Total	35	100
UNITED STATES EVENTS		
• Less than $20	3	8.6
• $20 - $50	7	20.0
• $50 - $100	7	20.0
• $100 - $200	11	31.4
• More than $200	7	20.0
		100
• Avg. Exp. per U.S. event = $123		

Question 10.(a)(b) Annual participant expenditures and leakage to the U.S.

	No. of Respondents	Percentage
• TOTAL	42	100
• Less than $1,000	0	0
• $1,000 - $2,000 Average leakage/participant = $500	3	7.1
• $2,000 - $5,000 Average leakage/participant = $1020	24	57.1
• $5,000 - $10,000 Average leakage/participant = $2000	9	21.4
• More than $10,000 Average leakage/participant = $4400	6	14.3
		100

Question 10.(c) Principal types of purchases from the U.S.

	No. of Respondents	Percentage	Percentage of Respondents
· TOTAL	46	100	
· None	8	17.4	8.7
· Tires	23	50.0	25.0
· Engine/Motor Parts	14	30.4	15.2
· Fuel/Gas	18	39.1	19.6
· Parts (unspecified)	15	32.6	16.3
· Others	14	30.4	15.2
	92		100

Question 11. Annual expenditures for those not competing in motorsport events.

... two responses only received...results are, therefore, inconclusive.

Question 12. Number of events expected to participate in at a new facility.

	No. of Respondents	Percentage
• TOTAL	48	100
• Fewer	0	0
• About the same	5	10.4
• Several more per year	8	16.7
• Substantially more per year	33	68.8
• Don't know/uncertain	2	4.2

Question 13. Limit of distance travelled to use the new motorsport centre.

	No. of Respondents	Percentage
• TOTAL	48	100
• Less than 10 miles	0	0
• 10 - 20 miles	5	10.4
• 20 - 40 miles	6	12.5
• 40 - 60 miles	16	33.3
• 60 - 80 miles	6	12.5
• More than 80 miles	15	31.3

Question 14. (a)(b)(c)(d)(e) Sample demographics

	No. of Respondents	Percentage
• TOTAL	48	100
SEX		
• Male	45	
• Female	3	
		100
AGE		
• 12 - 19 years	1	
• 20 - 24 years	8	
• 25 - 34 years	24	
• 35 - 44 years	12	
• 45 years and older	3	
		100
HOUSEHOLD SIZE		
• One	3	
• Two	13	
• Three to four	22	
• Five or more	6	
• No answer	4	
		100
MARITAL STATUS		
• Single	16	
• Married/common law	31	
• Other	1	
		100
CITY OF RESIDENT		
• City of Vancouver - East of Main	6	12.5
• Burnaby	3	6.3
• Surrey	12	25.0
• Coquitlam	2	4.2
• New Westminster	2	4.2
• Richmond	5	10.4
• Delta	2	4.2
• Langley	3	6.3
• Port Coquitlam	3	6.3
• Port Moody	2	4.2
• Mission/Haney/Maple Ridge	3	6.3
• Other Lower Mainland	5	10.4
		100

Question 14. (f) Sample demographics (cont'd)

	No. of Respondents	Percentage
• TOTAL	48	100
• Under $15,000	0	-
• $15,000 - $19,999	4	8.3
• $20,000 - $24,999	4	8.3
• $25,000 - $29,999	4	8.3
• $30,000 - $34,999	8	16.7
• $35,000 - $39,999	7	14.6
• $40,000 - $49,999	4	8.3
• $50,000 - $59,999	5	10.4
• $60,000 or more	8	16.7
• Refused	3	6.3
• Don't know	1	2.1
		100

Appendix G

MARKET RESEARCH OF U.S. PARTICIPATION IN MOTORSPORT

Appendix G

MARKET RESEARCH OF U.S. PARTICIPATION IN MOTORSPORT

This appendix includes detailed data and results pertaining to the research undertaken of participation in motorsport events in the United States. A drag race audience survey commissioned by the National Hot Rod Association (NHRA) was in progress at the time this report was prepared and is, therefore, not included.

A. RESEARCH APPROACH

Data compiled on United States participants in motorsport included information supplied by the Long Beach Grand Prix Association, CART, Circle Track Magazine, SCCA and NASCAR. It has been categorized as follows:

▶	Road Circuit Races	- pertaining to major road racing events similar to the Formula One and Indy Car series held at Long Beach, California ... this category would include IMSA and SCCA pro-events.
▶	Oval Track Races	- encompassing activities such as Indy Car and NASCAR (stock car) racing at major oval tracks.
▶	Short Track Races	- consisting of a variety of 1/2 mile to one mile - type paved or dirt tracks featuring sprint cars, late-model stock cars and dirt track cars.
▶	Amateur or Club Races	- utilizing existing road circuits or open areas for divisional races, rallies or gymkhanas.

B. ROAD CIRCUIT RACES

Attendance (Raceday)......55,000 - 75,000

Age: Under 17 - 3%
18 - 25 - 18%
26 - 35 - 38%
36 - 49 - 29%
50 + - 12%

Sex: Male - 74%
Female - 26%

Marital Status:
Single - 52%
Married - 48%

Level of Education:

Attended High School - 3%
High School Graduate - 14%
Attended College - 38%
College Graduate - 28%
Post-Graduate - 17%

Family Income:

Up to $15,000 - 7%
15,000 - 25,000 - 17%
25,000 - 35,000 - 22%
35,000 - 50,000 - 25%
50,000 + - 29%

Occupation:

Professional - 39%
Manager/Proprietor - 18%
Sales/Promotions - 10%
Student - 8%
Other - 25%

C. OVAL TRACK RACES

Attendance (Raceday)......35,000 - 65,000

Age: Under 17 - 4%
18 - 21 - 6%
22 - 30 - 32%
31 - 39 - 29%
40 + - 12%

Sex: Male - 84%
Female - 16%

Marital Status:
Single - 45%
Married - 55%

Household Income:

Up to $15,000 - 9%
15,000 - 25,000 - 23%
25,000 - 50,000 - 48%
50,000 + - 20%

Number of Cars Owned:

One - 35%
Two - 42%
Three - 14%
Four + - 9%

Number of Races Attended:

0 - 5 - 71%
6 - 10 - 15%
11 - 15 - 5%
16 - 24 - 3%
25 + - 6%

Racing Publications Read:

Autoweek - 21%
Road & Track - 15%
On Track - 11%
Car & Driver - 8%
NSSN - 7%
Other - 38%

Mileage (One-Way) to Track:

0 - 99 - 57%
100 - 199 - 21%
200 - 299 - 8%
300 + - 14%

Source of Race Information:

Ticket Brochure - 15%
Magazine - 13%
News Story - 12%
Print Ad - 12%
Radio - 11%
Friend - 10%
TV - 9%
Other - 18%

D. SHORT TRACK RACES

Attendance (Raceday)......10,000 - 20,000

Age: 18 - 24 - 19%
25 - 34 - 38%
35 - 44 - 31%
45 - 54 - 10%
55 + - 2%

Household Income:

Up to $10,000 - 4%
10,000 - 15,000 - 9%
15,000 - 25,000 - 27%
25,000 - 35,000 - 30%
35,000 + - 30%

Car Purchases:

In Last Year - 61%
New Car - 30%
Used Car - 66%
Both - 4%

E. AMATEUR OR CLUB RACES

Age: 18 - 24 - 7%
25 - 34 - 42%
35 - 49 - 44%
50 + - 7%

Sex: Male - 96%
Female - 4%

Marital Status:
Single - 38%
Married - 62%

Occupation:

Manager/Executive - 32%
Engineer/Pilot - 15%
Mechanic/Craftsman - 9%
Technician - 8%
Entrepreneur - 8%
Sales - 7%
Other - 21%

Level of Education:

Attended High School - 1%
High School Graduate - 10%
Attended College - 30%
College Graduate - 34%
Post-Graduate - 25%

Household Income:

Up to $15,000 - 4%
15,000 - 25,000 - 14%
25,000 - 35,000 - 22%
35,000 - 50,000 - 27%
50,000 + - 33%

Principal Residence:

Own Home - 70%
Rent - 23%
Other - 7%

Vehicle Purchase Plans:

Within One Year - 32%
Within Two Years - 50%

Special Equipment Owned:

35mm Camera - 82%
Slide Projector - 42%
Movie Camera - 23%
Movie Projector - 21%
Video Player - 30%
Car Stereo - 80%
Home Stereo - 88%
Home Computer - 24%

Investment Preference:

Savings Account - 48%
Money Market - 41%
Real Estate - 41%

Longest Distance Travelled to Event:

50 miles - 2%
100 miles - 6%
250 miles - 17%
500 miles - 24%
750 miles - 17%
1,000 miles + - 34%

Usual Accommodations at Race Event:

Hotel/Motel - 67%
Camping - 15%
Motorhome - 10%
Other - 8%

Auto Publications Read:

Road & Track - 33%
Autoweek - 31%
Car & Driver - 26%
On Track - 19%

Appendix H

ECONOMIC CHARACTERISTICS OF THE MOTORSPORT INDUSTRY

Appendix H

ECONOMIC CHARACTERISTICS OF THE MOTORSPORT INDUSTRY

This appendix includes detailed information on the approach used, the results obtained and the analysis undertaken concerning economic characteristics of the motorsport industry in the Lower Mainland.

A. ECONOMIC RESEARCH QUESTIONNAIRES

The questionnaires used to undertake the economic research are included in the following nine pages. The first questionnaire was used during telephone interviews and the second was used during personal interviews.

MOTORSPORT TELEPHONE QUESTIONNAIRE

Name of Firm: ______________________ Interview Date: __________
Address: ______________________ Time Started: __________
Telephone: ______________________ Time Finished: __________

Hello, I am __________, with Thorne Stevenson & kellogg. We have been commissioned by The Province of British Columbia to study the economic impact of motorsport on various businesses and industries in the B.C. Lower Mainland. Could you help us by sparing about five minutes for a few questions?

(If no, ask when it would be convenient to call back)

Call back time: ______________
Ask for: ______________
(name, if different from above)

Useful Definitions:

Purpose of the study (if you are asked):	To determine the extent to which motorsport activity affects various types of business...specifically, what portion of your business depends on competitive motorsport and how many jobs does this represent.
'Motorsport'	Organized activities held at Westwood, Mission and Action raceways....and those which could be held at a major motorsport centre in the future. Organized events include competitive racing as well as social events such as swap meets, picnics, etc.

---

1. (The following information should be sought when it is convenient during the interview):

Person contacted: ______________________
Position: ______________________

			Y	N
This firm:	a)	has one outlet, at the above address	____	____
	b)	is one of ______ branch outlets in B.C.		
	c)	is one of ______ branch outlets in Canada		
	d)	is a franchise operation	____	____
	e)	has a head office located in ______		
	f)	other comments (for example, the firm may be a subsidiary of a U.S. car manufacturer):		

____
____
____
____

2. What is your primary or largest business activity/market segment? (identify % of total gross revenues, if possible)

	Wholesale	Retail	Distribution
Auto parts/supplies	____________	____________	____________
Auto servicing	____________	____________	____________
Accommodation	____________	____________	____________
Food Services	____________	____________	____________
Beverage Sales	____________	____________	____________
Motorcycle Sales/ Parts/Service	____________	____________	____________

3. a) Could you tell me the approximate gross sales of your company annually? (This outlet only, if there are more than one). $____________

(stress confidentiality — important to get answer to this question)

b) Approximately what proportion of this business results directly from motorsport activities held at the principal tracks in the Vancouver area (i.e. Westwood, Action, Mission)? __________%

(may be easier to talk by **season**)

c) What additional motorsport business do you generate which results from general interest in motorsport but is not directly tied to motorsport events? __________%

INTERVIEWER CAN HELP OUT BY IDENTIFYING THESE HYPOTHETICAL EXAMPLES

(e.g.. high performance parts suppliers may generate 15% of gross revenue from motorsport events, but 70% or more due to general interest in motorsport automobiles).

...hotels may generate 5% from motorsport events and zero extra from general motorsport interest)

d) How may people, including yourself, does your company (this outlet) employ?

Full-time	__________	Average wage	__________
Part-time (Seasonal)	__________	Average wage	__________
		Days per year	__________

4. What forms of motorsport are most important to you? Which facilities?

____

Why? (besides direct sales, there may be spin-offs or indirect effects)

____

____

5. How close (no. of kilometres) are you to a race track? ________ kms. (If within 10 kms). Is it important for your business to be close to a race track?

____

____

IMPORTANT QUESTION

6. Can you estimate what percentage of your cost of goods sold/gross sales revenue is spent on goods or services imported from outside B.C.?

________ **% cost of goods sold**

________ **% gross sales revenue**

7. Where do your imports come from? (%, if you can get it)

Other Canada (specify) ________________
U.S.A. ________________
Europe (specify countries) ________________
Japan ________________
Other (specify) ________________

Why do you import?

a) For the best quality ________________
b) for the best price ________________
c) Because no local product exists ________________
d) To satisfy customer preference ________________
e) This firm imports from a mother company, subsidiary, other ________________
f) Other reasons (specify) ________________

____

____

____

What are the principal parts or supplies which your import? ________________

____

____

8. Do out-of-town visitors who come to attend motorsport events buy goods or services from you? Y _____ N _____

How often, or how much of your business does this represents? ________ sales or times/year

________ $ or %

9. On average, how much would a non-resident spend doing business with you?

$ ____________

10. With respect to the motorsport-related parts of your business, who is your major competition? ______________________________

____

11. Could you estimate for us your company's share of the motorsport-related market.

_________ % of the neighbourhood (local) market
_________ % of the Lower Mainland market.

12. Do you feel that your business volume would increase should a major motorsport complex be developed on the Lower Mainland?

Yes _______
No _______

If yes, by approximately how much?

less than 10% _______
10% - 20% _______
greater than 20% _______

13. Do you feel that your business volume would decline if existing competitive motorsport facilities were closed? Yes _______ No _______

By approximately how much? _______%

Which track closure would affect your business most? ______________________
(Action, Mission, Westwood)

14. General comments from business person re: motorsport development & Lower Mainland businesses. (e.g. how much busier they were when Mission had a paved dragstrip several years ago.)

____
____
____

Interviewer's Comments

____
____
____
____
____
____

LOWER MAINLAND MOTORSPORT CENTRE
ECONOMIC AND MARKET STUDY

Business Survey Questionnaire
Personal Interviews

Interviewer:__________
Date:________________

1. Name of business: ______________________________

   Address/Municipality: ______________________________

   Telephone No. ______________________________

   Person Interviewed/
   Position: ______________________________

2. Type of business: ______________________________

   Major market segments (e.g. auto parts, servicing, accommodation, food & beverage, etc.) ...(by proportion of gross sales)

________________	e.g.	Parts/supplies	%__________
________________		Servicing	%__________
________________		Acc.	%__________
		F & B	%__________

3. Size of business: Employees

   - full-time: ________
   - part-time: ________ days per year ___
   - seasonal: ________ days per year ___

   Annual sales volume (approx.):

   Seasonality (% of sales)
   - Dec/Jan/Feb: %____
   - Mar/April/May: %____
   - June/July/Aug: %____
   - Sept/Oct/Nov %____

   100%

4. **Proportion of sales related to competitive motorsport activity held at the principal facilities in the Vancouver area.** (i.e., events/activities held at Mission, Action, Westwood, PNE, BC Place, etc.)

► % of sales by season
- Dec/Jan/Feb %____
- Mar/April/May %____
- June/July/Aug %____
- Sept/Oct/Nov %____

► Noticeable increases in business during the weekends when major events are held:

____

____

5. **Type of busines represented by competitive motorsport activity**
(e.g., high performance parts supply, body work, accommodation, sales, etc.)

► Principal types of business: ________________________

____

► Secondary types of business: ________________________

____

► What forms of motorsport are most important to your business?

____

____

6. **What additional motorsport business do you generate which results from general interest in motorsport but is not directly tied to motorsport events held at the three existing tracks?**

________ % of annual gross sales

7. **Has the business of your company which is related to motorsport activity increased or decreased over the past several years?**

Increased ____

Decreased ____

By approximately what proportion? (calendar year or fiscal year ending in year shown)

1984 vs 1983 ____
1983 vs 1982 ____
1982 vs 1981 ____

Comments: ______________________________

____

8. **With respect to the motorsport-related parts of your business, who is your major competition?**

____

____

9. **For that part of your business which is tied to motorsport activity, what is your estimate of the proportion of your gross sales revenue which is spent on goods or services imported from outside British Columbia? (i.e. leakage)**

(e.g., cost of auto parts or tires not made in the Province and imported from the U.S., body components imported, food imported, clothing imported, etc.)

Estimated proportion: % ______________________________

Comments: Imported from where? ______________________________

Why imported? ______________________________

Type of goods imported? ______________________________

10. **Do you sell to or service visitors who come to the Vancouver area to attend or participate in motorsport events?**

Yes _____ No _____ (i.e. market is primarily local residents)

If yes, what amount of money do these visitors generally spend at the time they do business with you?

$ _______

11. **Is it important or necessary for your business to be located close (i.e. within 10 to 20 kilometres)to a race track to take advantage of business opportunities represented by motorsport enthusiasts?**

Yes _____ No _____

Comments: (e.g. distance criteria) ______________________________

____

____

How close are you located to a race track now? ____________________ km

12. **Should a major motorsport centre be developed on the Lower Mainland which ensures long-term security for motorsport, and which hosts major international events, what will the likely effects be on your business?**

No change _____ Decline _____ Increase _____

By approximately what level? _____

Comments: (e.g. conditions, employment increase, etc.):

____

____

____

13. **Miscellaneous questions, depending on interviewee!**

a) Did you suffer a decline in business when Mission relocated and did not have a paved drag strip? To what extent? What type of business was lost?

b) If Action Raceway's lease is not renewed for 1985 and the track is not operational next year, what decline in business, if any, will you experience? Type of business lost?

c) If Westwood was to close permanently, what effect do you feel this would have on your business?

d) What new types of motorsport activity (or increases in existing activity levels) would be most beneficial to you from your business' point of view?

e) Are there any imported (from outside B.C.) goods or services which you now sell to motorsport enthusiasts which you feel could be produced or provided locally if increased levels of motorsport activity were experienced? Which ones? Type of motorsport to which these are related?

f) What level of business volume increase would you need to experience before you hired additional employees?

g) What volume decline would encourage you to lay-off existing staff or close your business?

General comments/notes:

____

____

____

____

____

____

Follow-up required:

____

____

____

B. LIST OF BUSINESSES CONTACTED

Manufacturers

1.	RAS Industries Ltd.	Vancouver
2.	Phillips Zimmelman Development Corp.	Burnaby
3.	EBCO Industries Ltd.	Richmond
4.	Greens Automotive	Richmond
5.	Metal Spinning Co. Ltd.	Vancouver
6.	Thomas E. Johnson Engineering	West Vancouver
7.	Davenport Fabrication	Port Moody
8.	Spirit Engineering	Surrey

Automobile Dealers

1.	Honda Canada Incorporated	Richmond
2.	Boucher Motors Ltd.	Vancouver
3.	Ross International Motors	Richmond
4.	Westminster Volkswagon/Porche/Audi	New Westminster
5.	Fogg Motors Limited	New Westminster
6.	Precision Auto Centre	Coquitlam
7.	Metro Ford	Port Coquitlam
8.	Guildford Motors	Surrey
9.	Langley Honda	Langley
10.	Lindal Imports (1977) Ltd.	Langley

Automotive Parts Distributors

1.	Keystone A.A. Industry	Richmond
2.	Norm Fieldgate Ltd.	Vancouver

3.	Lyman Warehouse Distributors Limited	Vancouver
4.	Western Warehouse	Burnaby
5.	Dix Performance Limited	Burnaby
6.	Dix Distributors Limited	Burnaby
7.	Pacific National Distributors	Vancouver
8.	Formula Distributors Limited	Burnaby

Automotive Parts Suppliers

1.	White & Peters Limited	Vancouver
2.	Sully's Auto Parts Limited	Vancouver
3.	Southside Parts and Industrial Supplies Ltd.	Vancouver
4.	Pacific Parts Limited	Vancouver
5.	Amirs Japanese Auto Service and Parts Supplies Limited	Burnaby
6.	Magnem Engine Services Limited	Burnaby
7.	Fleetline Parts and Equipments Limited	Burnaby
8.	Art Humphrey Automotive Limited	Burnaby
9.	Burnaby Auto Parts Limited	Burnaby and Vancouver locations
10.	Harlin Corvette Supplies Inc.	Burnaby
11.	The Mini-Centre	Burnaby
12.	Canadian Tire	Coquitlam
13.	Murray's Automotive	Port Moody
14.	BarMac Auto Marine Limited	Delta
15.	Whalley Automotive (1971) Limited	Surrey
16.	Surrey Auto and Industrial Supplies Limited	Surrey

17.	Mitchell Automotive	Surrey
18.	Acklands	Surrey
19.	Whiterock Automotive Supply Limited	Whiterock
20.	Lordco Parts Limited	Maple Ridge
21.	P & T Parts Limited	Maple Ridge
22.	J & L Machining	Maple Ridge
23.	Hutco Parts Limited	Langley
24.	Barber's Wheelhouse Langley Limited	Langley
25.	Alder Auto Parts Limited	Aldergrove
26.	Wakefield Sperling Auto Parts	Abbotsford
27.	Stamp's Automotive Limited	Abbotsford
28.	A-Active Salvage and Recycling	Abbotsford
29.	Fortin's Supply Limited	Chilliwack
30.	British Car Parts Limited	North Vancouver
31.	Western Accessories Limited	New Westminster and Langley locations

Automotive Servicing - High Performance

1.	Kerrisdale Speed Centre	Vancouver
2.	Mopac Auto Supply Limited	Vancouver and Surrey locations
3.	Street and Strip Engineering	Burnaby
4.	California Speed Centre Limited	Burnaby
5.	High Performance Engines Limited	Burnaby
6.	Pro Speed and Custom Auto Supply	Burnaby
7.	Specialty Engineering Limited	New Westminster

8.	Innovative Automotive	New Westminster
9.	Harrison Performance Engineering Limited	North Vancouver
10.	Thunderbolt Engines Limited	Langley
11.	Flodin Automotive	Abbotsford
12.	KM Automotive Limited	Vancouver
13.	Dave's Performance Products	Langley
14.	Nixon Automotive	Burnaby
15.	B.C. Valve and Crank Service Company Limited	Vancouver
16.	Richmond Auto Clinic	Richmond
17.	Key West Automotive	Port Moody
18.	Abbington Motors Racing Limited	Vancouver
19.	Robro Enterprises	Langley
20.	Spirit Engineering	Surrey

Automotive Servicing - General Performance

1.	Allied Parts and Engines	Vancouver
2.	Import Automotive	Vancouver
3.	Alec's Automotive Machine Shop Limited	Vancouver
4.	Bond Mechanical Limited	Vancouver
5.	Terry's British Cars Limited	Vancouver
6.	Boss Automotive	Richmond
7.	Minit-Tune Auto Centre	Coquitlam
8.	Kirmac Collision Repairs Limited	Coquitlam
9.	Coquitlam Automotive Limited	Coquitlam

10.	Commonwealth Motors Limited	Vancouver
11.	Reg's Auto Shoppe	Port Coquitlam
12.	German Motor Car	Port Coquitlam
13.	Bert's Auto Transmission	New Westminster
14.	Langley Engine Rebuilders Inc.	Langley
15.	Finn's Auto Body Limited	Langley
16.	Mojo Performance	Clearbrook
17.	Arrow Radiators	Vancouver
18.	Wes-Coast Radiator	Surrey
19.	Nor-Est Radiator	Langley
20.	Sport Aviation Corp.	Richmond
21.	Turin Automotive	North Vancouver
22.	Gasoline Alley Quality Automotive Maintenance Limited	North Vancouver
23.	Bert's Automotive Transmissions	Vancouver

Tires

1.	Canadian Cash and Carry Tire Centre	Burnaby
2.	OK Tire	Burnaby
3.	Yokohama Tire (Canada) Inc.	Burnaby
4.	Circuit Tire Sales and Service Limited	Port Moody
5.	Superior Tire and Alignment	Surrey
6.	Big O Tires (Canada) Inc.	Langley
7.	Pacific Rim Tire Distributors	Vancouver

Motorcycles Sales and Service

1.	North Shore Suzuki	North Vancouver
2.	Performance Motorcycles	North Vancouver
3.	Honda Centre	Vancouver
4.	Carter Honda Shop Limited	Vancouver
5.	Trev Deeley Motorcycles Limited	Vancouver
6.	Vancouver Suzuki Motorcycles	Vancouver
7.	Atlas Motorcycle Parts	Vancouver
8.	G.A. Checkpoint Yamaha	Vancouver
9.	Hole Shot Racing	Vancouver
10.	Burnaby Kawasaki	Burnaby
11.	The Parts Shop	Burnaby
12.	Richmond Honda Motorcycle Power Products	Richmond
13.	Mongoose Machines and Engines Limited	Port Moody
14.	G.A. Checkpoint	Port Moody
15.	S & R Services	Port Moody
16.	Cariboo Motorcycles	Port Moody
17.	G.A. Checkpoint Yamaha	Surrey
18.	Cycle Associates	Surrey
19.	Yoshimura Northwest	Chilliwack
20.	G.A. Checkpoint Yamaha	Langley

MISCELLANEOUS

1.	Mohawk Lubricants Limited	North Vancouver
2.	Rustan Metals	Vancouver

3.	Micron Canada	North Vancouver

ACCOMMODATION

1.	Mission Inn	Mission
2.	Blue Boy Motor Hotel	Vancouver
3.	Sandman Inn	Howe Street, Vancouver
4.	Sheraton-Villa Inn	Burnaby
5.	Coquitlam Slumber Lodge	Coquitlam
6.	New Truhome Motel	Langley
7.	Economy Inn	Langley
8.	Diamond Head Motor Inn	Mission
9.	Port Moody Inn	Port Moody
10.	Westwood Motel	Port Coquitlam
11.	Best Western Poco Motor Inn	Port Coquitlam
12.	New Coquitlam Travel Lodge	Coquitlam

FOOD AND BEVERAGE

1.	Scott Road Keg	Delta
2.	Barnet Motor Hotel	Port Moody
3.	Pantry Family Restaurant	Mission
4.	Pantry Family Restaurant	Port Coquitlam
5.	Wendy's Old Fashioned Hamburgers	Langley
6.	Port Arms Hotel	Port Moody
7.	Smitty's Pancake House	Maple Ridge
8.	Smuggler's Cabaret	Surrey

9. The Keg in the Country Langley

C. CALCULATION OF EMPLOYMENT

In the calculation of employment it was critical to get an estimate of the approximate number of firms in the automotive and motorcycle businesses as these are the companies most likely to have a proportion of their business related to motorsport. The method we used to obtain the overall number of businesses involved a search of the Yellow Page Directories for six telephone districts in the Lower Mainland covering the area from the North Shore inclusive through to Abbotsford. We reviewed twenty-four categories of automotive businesses and motorcycle businesses. Because of the tendency of firms to advertise in several different categories we could not simply use the totals of all the firms indicated in the directories. We have gone through a process of reducing each of the categories where a review of the list warranted this action. Presented below are assumptions by each key category.

1. Automobile Dealers

This category includes new and used car dealers. A review of two of the directories indicated between 25 to 33% of new car dealers were also listed as used car dealers. We therefore reduced the total by 30%.

2. Automobile Parts Distributors

This category includes both wholesalers and manufacturers. A review of the Vancouver Directory area indicated that 21% of these wholesale distributors overlapped with the retail parts suppliers. Since the Vancouver area is the largest we therefore reduced all of the figures of businesses by 20%.

3. Automobile Parts Suppliers

This group includes automobiles parts and suppliers and from the retail, used and rebuilt groups. A review of the suppliers lists indicates that approximately 15% of all suppliers were in fact car dealers. In addition there was approximately a further 5% overlap in the used and rebuilt categories. Therefore we reduced this category by 20%.

4. Automobile Servicing - High Performance

A review of this category indicated a very minor overlap with any other category. We therefore allowed this category to stand as was presented.

5. Automobile Servicing - General Performance

This automobile servicing category includes automobile repairs and service, automobile radiators - manufacturers, distributors and repairing, and automobile machine shop service. While there is little overlap with regards to the radiator businesses there is some overlap with the machine shops. We therefore reduced this category by 10%.

6. Tires

The tire category includes tire dealers, distributors, wholesalers and manufacturers. There is a minor amount of overlap within the category and in addition there is some overlap with parts and with car dealers. We therefore reduced this section by 10%.

7. Motorcycles Sales, Parts and Service

Included in this category are motorcycle sales, parts and supplies, and repairing and service businesses. A review of two of the directory areas indicated between 55 and 65% of the sales firms also listed in the parts and service category. We therefore combined the sales category as it stood with 40% of the parts and service figures as well as adding in the repairs businesses since they were very few. This then resulted in a reduction of approximately 30% of the motorcycle businesses.

8. Automobile Painting

As there is some overlap with repair firms and body repair firms we reduced this category by 5%.

9. Automobile Electrical Services

Again this category is occasionally included in the repair services. This was also reduced by 5%.

10. Automobile Seat Covers, Tops and Upholstery

This category was not reduced. This category is relatively discreet and does not appear to have any overlap with any of the other groups.

11. Automobile Restoration and Customizing

As the nature of these businesses is also to provide automotive repair and service we therefore found some overlap with service businesses and reduced this category by 10%.

12. Automobile Wheel Alignment, Axle and Frame Repairing

Our review of the Vancouver area directory which contains the largest number of businesses indicated that approximately 20% of the wheel alignment firms were in fact tire stores. We reduced all the categories by 20%.

13. Automobile Wrecking

Automobile wrecking are really used part dealers. A review of the parts category, particularly for used parts, indicated that a number were automobile wrecking businesses. We therefore reduced this category by 10%.

As a result of these assumptions the total number of firms was reduced by 12% to slightly over 3,200 firms.

The general approach for calculating employment was to take the average number of employees per firm by each of the main categories and determine the average number of employees who were directly related to competitive or general motorsport. These calculations were based on the business share allocated to those two categories. In turn these figures were multiplied by the number of companies in each category to produce the total number of jobs estimated to be generated by motorsport in both the competitive and the general categories. All of the data to derive the employee figures for the main categories of

- manufacturing
- automobile dealers
- automobile parts distributors
- automobile parts suppliers
- automobile servicing - high performance
- automobile servicing - general performance
- tires
- motorcyles sales, parts and service

were based on the results of the survey. The remaining categories:

- automobile painting
- automobile electrical services
- automobile seat covers, tops and upholstery
- automobile restorations and customizing
- automobile wheel alignment, axle and frame repairing
- automobile water repairing and body shop equipment supplies
- automobile wrecking

were judged to generally have lesser significance with regards to the generation of employment related to motorsport. Consequently no special surveys were undertaken for these categories. Based on the activities undertaken by each of these types of firms and our experience with these businesses judgements were made on the average number of employees and the typical allocation of businesses to competitive or general motorsport. Where a similar business category existed such as in automobile restorations and customizing which has some similarity with high performance general service some of the figures used were similar, likewise in the case of automobile wrecking which is closely related to automobile parts. In the other categories though the figures were quite low as in the whole the businesses do not apply. Large categories, automobile body repairing was assumed to primarily generate most of its business from insurance claims. Some of the other businesses such as the automobile seat covers perhaps have applicability to general motorsport vehicles but really have no main basis with competitive vehicles.

D. ECONOMIC PROFILE OF COMPANIES INTERVIEWED

EXHIBIT

	Activities	Size Annual Gross Sales ($)	Full-Time Employees	Percentage of Business Dependent on Motorsport		Seasonality	Motorsport Activities Important Business	Need to be near track
				Competitive	General			
Manufacturing	· fabrication of racing vehicles · manufacture of parts (axles, floating rears custom wheels, roll-bars, wide wheels)	$35,000 - $35M (but $2M auto) Average = $567,800	1 - 35 Average of 8.5	0 - 100 Avg. 14.4	1.0 - 90 Avg. 41.0	No	· drag · tractor pull · 4 X 4 · circuit	rallies 1 vintage 1 oval 1
Automobile Sales	car sales, parts & service	$1M - $15M Average $6,750,000	8 - 60 Average = 25.3	0 - 5 Average = 1.7%	0 - 100 Average = 15.3	Minimal, Spring/Fall	· circuit 87.5% · oval 12.5% · rally 12.5%	Not indicated
Automotive Distributors	· automotive parts importers and/or distributors · some specialists (wheels, shocks)	$3M - $50M Average $11,500,000 but 1/2 under $3M	15 - 20 Average = 15.4	0 - 80 Avg. 8.1	0 - 50 Avg. 8.1	Spring & Summer peak	· drag 75% · circuit 75% · oval 38% · 4 X 4 13% · boats 13% · rally 25%	No
Automotive Parts	wholesale and retail automotive parts; some related servicing	$100,000 - $6M Average = $1,143,750	1 - 50 Average = 10.8	0 - 30 Average 6.2%	0 - 60 Average - 4.0%	Summer	· none 21.8% · circuit 28% · demo derby 3% · drag 28% · oval 21.8% · slalom 3% · boat 3% · tractor 3%	No
Automotive Servicing	High performance servicing including related machining and parts	$85,000 - $1,000,000 Average of $272,750	1 - 16 Average of 3.4	1 - 80 Average of 17.6%	0 - 80 Average of 35.2%	Peak of March - October	· drag 65% · circuit 55% · oval 30% · slalom 10% · boat 20% · sand drags 5% · motor-cycles 10% · 4 X 4 10% · tractor pulls 5% · street racing 5% · driver education 5%	30% yes
	General performance and related parts	$136,000 - $2,000,000 Average of $388,500	2 - 30 Average of 9.0	0 - 33 Average of 6.0	0 - 33 Average of 9.4%	Summer	· none 17.4% · circuit 52% · drag 30% · oval 26% · 4 X 4 9% · boat 9% · motor-cycle 4% · tractor pulls 9% · driver training 4% · offroad 14%	No
Tires	retail and wholesale tires and related servicing	$250,000 - $1,000,000 Average of $600,000	2 - 15 Average of 7.6	0 - 60 Average 17.3%	0 - 80 Average of 13.1%	Spring and Fall	· none 29% · offroad 14% · drag 29% · circuit 71% · endurance 14% · oval 29% · customi-zing 17% · motor-cycle 14% · vintage 14%	No
Motorcycles	sales, parts and service to all types of motorcycles	$50,000 - $5,600,000 Average of $1,343,000	1 - 34 Average of 6.8	0 - 90 Average of 23%	0 - 40 Average of 14.5%	Spring and Summer peak	· road racing 86% · none 5% · motocross 19% · super-cross 5% · X-country endurance 10% · flat track 14% (dirt)	No

E. BUSINESS LISTING FOR SAMPLE EXPANSION

EXHIBIT

Business	North 1) Shore	Vancouver 2)	New 3) Westminster	Richmond 4) S. Delta	Langley 5) Surrey	Central 6) Fraser Valley	TOTALS
Automobile Painting	26	89	39	24	44	19	241
Automobile Parts & Supplies							
- Retail	29	104	19	24	68	23	267
- Used & Rebuilt	4	17	20	6	28	9	84
- Wholesale & Manufacturers	17	121	42	18	37	12	247
Automobile Racing and Sportscar Equipment	5	11	23	4	12	2	57
Automobile Radiators							
- Manufacturers & Distributors	0	5	2	0	0	0	7
- Repairing	2	10	13	6	14	5	50
Automobile Machine Shop Service	3	10	5	4	9	3	34
Automobile Electrical Service	8	33	13	8	11	2	75
Automobile Seat Covers, Tops and Upholstery	4	19	8	4	7	3	45
Automobile Restorations	2	6	6	4	5	2	25
Automobile Tires							
- Dealers & Distributors	18	86	43	30	29	20	226
- Wholesale & Manufacturers	3	10	2	2	1	0	18
Automobile Wheel Alignment, Axle & Frame Repairing	12	39	28	10	19	12	120
Automobile Repairing and Service	125	357	154	90	189	76	991
Automobile Body Repairing	43	190	101	46	97	34	511
Automobile Body Shop Equipment and Supplies	0	11	6	1	7	0	25
Automobile Customizing	1	2	5	4	10	2	24
Automobile Dealers							
- New	14	46	33	20	28	17	158
- Used	11	69	36	8	34	28	186
Automobile Wrecking	3	23	28	9	38	16	117
ALL AUTOMOTIVE	330	1258	626	322	687	285	3508
Motorcycles							
- Sales	4	19	9	12	12	8	52
- Parts & Supplies	0	18	9	2	17	7	52
- Repairing & Service	-	1	1	-	2	1	5
ALL MOTORCYCLES	4	38	19	14	31	16	109
ALL AUTOMOTIVE AND MOTORCYCLES	334	1296	645	336	718	301	3619

Source: 1984 Yellow Page B.C. Telephone Directories

1) = North & West Vancouver
2) = Vancouver and part of Burnaby
3) = New Westminster, part of Burnaby, Port Moody, Port Coquitlam, Coquitlam and Maple Ridge
4) = Richmond and South Delta
5) = North Delta, White Rock, Langley City, Langley District, Surrey
6) = Abbotsford, Clearbrook, Matsqui, Mission

NOTE: There are duplications in some of the categories because of double and triple listsings. In addition, Burnaby and Delta areas also have some double counting as they are included in two volumes.
In addition, manufacturers have not been included in this list as they were not listed as such in the directories.